[Company name]

How to use this document: delete this paragraph before saving, sharing, or circulating it. Every part shown in blue is yours to replace: type your own details over each blue [field] until no blue remains. Then select all (Ctrl+A) and set the font colour to the same dark colour throughout. What is left is your finished document.

Sales Lead Tracker

Tracking every sales lead from first contact to close: who owns it, where it came from, what happens next, and when.

Document: Sales Lead Tracker **Version:** 1.0

Prepared by: _____ **Owner:** _____

Date: _____ **Review date:** _____ **Lead details:**

Lead name	Company	Contact	Phone / email	Source	Status	Owner	Next follow-up date

Follow-up schedule

Lead	Follow-up date	Method	Outcome	Next step

Lead status changes

Lead	Date	Old status	New status	Reason

[Company name]

Lead summary: New: _____ **Contacted:** _____

Qualified: _____ **Closed won:** _____

Closed lost: _____ **Total:** _____

Completion checklist: [ ] Every lead in the register has a source, a status, and a named owner ([Salesperson name]).

[ ] Every qualified lead has a follow-up date ([Follow-up date]) in the follow-up log.

[ ] Status changes are dated, with the reason recorded.