

SALES LEAD FOLLOW-UP

Tracking Period: _____

Agent: _____

| LEAD NAME / COMPANY | CONTACT METHOD | FOLLOW-UP TOUCHPOINTS | NEXT ACTION DATE | NOTES / OUTCOME |
|-------------------------------------|---------------------|--------------------------|------------------------|--------------------------------|
| | | 1 | | |
| | | 2 | | |
| Example Corp Jane Doe | Email / LinkedIn | 3 | Oct 24 | Waiting on budget approval. |
| | | 4 | | |
| | | 5 | | |

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|--------------------------------|---------------------------|----------------------------------|---------------------------------|----------------------------|
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