[Company name]

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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
Prepared by	[Name and role]
Owner	[Name and role]
Version	1.0
Date	[DD Month YYYY]
Review date	[DD Month YYYY]

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

[Company name]

Lead status changes

Lead	Date	Old status	New status	Reason

Lead summary

Status	Number of leads
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.