[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

[Company name]

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

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.