

Checklist

Library - Sales Project Task / Task - PTL 3.0 Convert Lead to Contact / Type Doc - Checklist

PTL 3.0 Convert Lead to Contact

- Contact's Area of Product Interest
- Contact Information (Name, Address, occupation, see 3.0 Convert Lead Form)
- Ongoing or Upcoming Building Projects
- Likelihood of repeat business
- Prestige value, or industry value of contact.
- State of Relationship
- Consider your next action with this Contact
 - Send Marketing Materials?
 - Set up task to call again?
 - Select a marketing campaign? (See - Sales Support/Campaigns)
 - Other?

