

Library - Sales Project Task / Task - PTL 3.0 Convert Lead to Contact / Type Doc - Form 03 / Title - Lead Task Form

PTL 3.0 Lead Task Form

SALES: DATE:											
*Full Name				*Occupation		Contact ID					
*Company Address											
Email	Work #				Mobile	Mobile #					
Project Name				Potential Value				Probability of Sale %			
*How Was the Lead Generated? Inbound Outbound											
*Type of Communication Phone											
*Source of Lead Advertising											
*Required Fields											
CHAMPIONS FOR THE LEAD – Any persons related to the lead (i.e. assistants, working groups, colleagues, etc.)											
NAME OCCUPATION		I COM		PANY		TELEPHONE			RELATIONSHIP		
REFERRAL LEADS - Any referred	person by the lead										
NAME OCCUPATION		COM		PANY		TELEPHONE			RELATIONSHIP		
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PROJECT LEADS – Any persons re											
NAME	OCCUPATION	OCCUPATION (OMPANY		TELEPHONE			RELATIONSHIP		
NOTES:											



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ACTION PLAN

CAMPAIGN										
Target Group	A 🗆	в 🗌	с 🗆	D [Other (spe	ecify)				
Campaign Goal	Start Date									
						1				
*NEXT ACTIONS					DUE DATE	ACTUAL DATE				
CONCERNS										
NOTES										