



## Sales Lead Follow Up Planner

Company's Name	
Company's Address	
Sales Personnel's Name	
Sales Personnel's Designation	

Particulars	Details
Name of Company	
Address of Company	
Company's Phone Number	
Interested in Product(s)	
Anticipated Volume of Business	
Key Contact Person's Name	
Key Contact Person's Designation	
Key Contact Person's Number	
Subordinate's Name	
Subordinate's Designation	
Subordinate's Number	
Current Stage of Deal	
Remarks (If any)	

### Meeting - 1

Scheduled Meeting Date	
Scheduled Meeting Time	
Agenda of Meeting	
Anticipated Outcome	
Client's Concerns / Queries	
Proposed Solution	
Other Key Points To Be Discussed	
Final Outcome / Proposed Next Action	

### Meeting - 2

Scheduled Meeting Date	
Scheduled Meeting Time	
Agenda of Meeting	
Anticipated Outcome	
Client's Concerns / Queries	
Proposed Solution	
Other Key Points To Be Discussed	
Final Outcome / Proposed Next Action	

**Meeting - 3**

Scheduled Meeting Date	
Scheduled Meeting Time	
Agenda of Meeting	
Anticipated Outcome	
Client's Concerns / Queries	
Proposed Solution	
Other Key Points To Be Discussed	
Final Outcome / Proposed Next Action	