



PROSPECT TRACKING SHEET

NAME _____

Contact Info:	Type	Preferred	Key Information
<input type="text"/>	Phone	<input type="checkbox"/>	<i>description, relationship, characteristics, key dates (birthdays, anniversaries, etc), family names, work place and any other information that will help you build rapport over time.</i>
<input type="text"/>	Email	<input type="checkbox"/>	
<input type="text"/>	Address 1	<input type="checkbox"/>	
<input type="text"/>	Address 2		
<input type="text"/>	City, ST Zip		

Date	What happened?	How did you leave it?	What's next?	When?
<i>Follow Up #1</i>				
<i>Follow Up #2</i>				
<i>Follow Up #3</i>				
<i>Follow Up #4</i>				
<i>Follow Up #5</i>				