

Prospecting Sheet

Name: _____

Phone #: _____ When to call _____

Email: _____

When/Where Met: _____

Notes: _____

Interested in:

Admin Tracking:

_____ Sent thank you card/ info? ____ Subscribed to email list ? ____

_____ Social Media (facebook, linkedin, Google + etc)? ____

Customer Options: Dealer / PC/ Commercial / ROTS (Circle all that apply)

____ Added to Contact Manager? Registered Account number: _____

Date	Response	Next Action

Tools:

www.thosecardfolks.com (sending thank you cards) www.mailchimp.com (free email program)
www.accountdirect.lube-direct.com (Dealer training) www.linkedin.com (business and social media)