

Lead Information	Contact Management	Sales Process	Marketing & CRM	Tracking & Analysis
<b>Lead Name</b>	<b>Contact details</b>	<b>Sales pipeline</b>	<b>Marketing efforts</b>	<b>Lead tracking</b>
Bobby Witt Jr.	Phone: (555) 123-4567, Email: bobby@[exampleemail].com	Initial contact made	Email campaign: New Listings	Lead added to CRM
<b>Lead source</b>	<b>Interaction history</b>	<b>Sales process</b>	<b>CRM software</b>	<b>Track leads</b>
Organic Search, Website	Called on Oct 10, 2024, Meeting on Oct 15, 2024	Needs assessment	Using Salesforce	Bobby Witt Jr. active
<b>Potential clients</b>	<b>Follow ups</b>	<b>Sales funnel</b>	<b>Marketing automation</b>	<b>Leads generated</b>
Yes	Follow-up call scheduled for Nov 1, 2024	Offer stage	Automated follow-up emails	5 leads this month
<b>Lead status</b>	<b>Client management</b>		<b>Identify trends</b>	<b>Track sales</b>
Qualified	Assigned to Agent: Sarah Johnson		Analyzing lead sources	2 sales closed this month
<b>Status</b>				<b>Keeping track</b>
Wants to buy a house, but won't be moving until Summer 2025				Weekly review meeting
<b>Lead details</b>				
Seeking 5 bedroom, 5 baths, and it needs to have a finished basement				
<b>Details</b>				

Organize leads				
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