

Sales Tracking Spreadsheet

#	Date	Name	1. Discovery Interview	2. Prospect Interview	3. Relationship Agrmnt	4. Needs Assessment	5. Buyer Resistance	6. Follow-Up	7. Sales Contracts	8. Add ons	Total Revenue	Revenue per Contract
1												
2												
3												
4												
5												
6												
7												
8												
9												
10												
Total												

Category	Formula	First #	Second #	Percentage (x100)	Comments
Rapport	$3/2 \times 100 = \%$				
Sales Pres	$4/2 \times 100 = \%$				
Effectiveness	$6/2 \times 100 = \%$				
Conversion	$7/2 \times 100 = \%$				

How to use this form

- For each new prospect that you work with. Record the date that you started with them and their name.
- Then as they progress through the sales process, record each of the steps that they complete with a check mark until they have bought or stopped in the sales process (#1 - #7 across the top)
- Once you have worked with 10 prospects, fill out the ratios in the bottom portion of the form