

# 150 Unit Tracking Spreadsheet Example

| Company                                    | Contact              | 1/1 | 1/8 | 1/15 | 1/22 | 1/29 | 2/5 | 2/12 | 2/19 | 2/26 | 3/5 | 3/12 |
|--|----------------------|-----|-----|------|------|------|-----|------|------|------|-----|------|
| Visitors Bureau                            | Bryanna Moore        | 80  |     | 80   | 90   |      | 100 |      |      |      |     |      |
| Health Sciences Consortium                 | Amy Tomhav-Cornell   | 150 |     | 150  |      | 150  |     | 150  |      | 150  |     | 150  |
| Health Sciences Consortium                 | Tim Whitcomb         | 70Q |     |      | 70   |      |     | 70   | 71   | 75Q  |     |      |
| Health Sciences Consortium                 | Susan Goodale        | 20  |     | 80   | 90   |      | 80  |      |      | 80   |     |      |
| Psychoanalytic Society                     | Lauren Linn          | 100 | 105 |      | 115  | 121  |     | 121X |      | 122X |     | 60   |
| Sheer Design                               | Mary MacRae          | 120 |     |      | 120Q | 121  |     | 122  | 122Q |      |     |      |
| Stewart Design                             | Megan Souleles       | 50  |     | 52   |      | 52   |     |      | 52   |      |     | 60   |
| CII Associates                             | Jon Loftus           | 40  | 40  | 40   |      |      | 40  |      | 40   |      | 40  | 50   |
| Brogden Body Shop                          | Arlene Stepputat     | 40  |     |      | 40   |      |     |      | 40   |      |     | 40   |
| Heard & Associates                         | Howard Harvey        | 45  | 50  |      | 60   |      |     |      | 60   |      |     |      |
| Standard Tools & Equipment                 | Catherine Remak      | 45  |     | 45   |      |      | 45  |      |      | 50P  |     | 100  |
| Standard Tools & Equipment                 | Kathleen Kramer      |     |     |      |      |      |     |      |      |      | 20  |      |
| Digiton Corporation                        | Rickh Loebel         | 40  |     |      | 50   |      |     | 60   |      |      | 70  |      |
| Association of School Administrators       | Julie Bremner        | 115 |     | 120  | 121  |      | 122 |      | 123  |      |     | 124Q |
| Auto Dealer Association                    | Michelle Bynum       | 30  |     | 40   | 41   | 42   | 43D |      |      |      |     |      |
| Reba & Roses                               | Jim Muneio           | 30  |     | 40   | 41   | 45   |     | 45   |      |      | 45  |      |
| Reba & Roses                               | Diane Armitage       | 30  |     | 40   | 45   | 50   |     | 60   | 100  |      |     |      |
| Textile Chemists & Colorists               | Tony Dutzig          | 30  |     | 40   | 41   | 50   |     | 51   |      |      | 51  | 51   |
| Pharmacy Technicians                       | Elizabeth Riddleton  | 30  |     |      | 40   | 50   |     |      | 50   |      |     | 50   |
| Social Health Association                  | Kira Krill           | 30  |     |      | 40   | 41   |     | 41   |      | 45   |     | 45   |
| Appraisal Institute                        | Alissa Sears         | 30  |     |      | 40   | 41   |     | 42   |      |      | 45  |      |
| Association For Population/Family Planning | Janet James          | 90  | 100 | 105  |      |      |     | 120  | 121R |      |     |      |
| Association For Population/Family Planning | Susan Tschech        |     |     |      |      |      |     |      | 20   |      | 40  | 50   |
| Association For Population/Family Planning | Kathleen Sullivan    |     |     |      |      |      |     |      | 20   |      | 40  |      |
| Biocommunications Association, Inc.        | Beverly Schwartzberg | 0   |     |      |      | 30   | 40  |      | 41   | 43D  |     |      |
| Brewers Association Of America             | Nan Anderson         | 0   |     |      |      | 30   | 40  |      | 41   |      |     | 50Q  |

- 0 Raw suspect
- 10 Suspect added with knowledge of company's printing needs
- 20 Suspect added via referral
- 30 Pre-approach research complete
- 40 Introductory letter(s)/package sent
- 50 First face-to-face meeting completed successfully
- 60 Second face-to-face meeting completed successfully
- 70 Continuing with follow-up plan; this prospect is definitely receptive
- 80 This prospect has decided to buy but has no immediate need. First order expected within 90 days.
- 90 First order expected within 30 days
- 100 First order received!
- 105 First Order Satisfaction Assured
- 110 Product Opportunity/People Opportunity Evaluations
- 115 Maximization Plan In Place
- 120 Maximization Efforts
- 150 Maximized Customer!

- D Permanent Disqualification
- R Recycle (Reminder Set)
- Q Open Quote/Proposal
- X Product Opportunity Order
- P People Opportunity Referral