Sales Lead Handling and Tracking to Shorten the Sales Cycle

Suggestions for Handling the Lead

Compile the leads and sort by coded priority.

The form has at least three copies. Tear the form and sort into three piles —

1. Copy one: give to sales manager(s).
2. Copy two: give to appropriate sales person who will be responsible for follow-up and the future sale.
3. Copy three: to be used for generating a mail list, sending **immediate** responses, and for your tracking control.

Within two days, mail one set of the leads to the appropriate sales field representatives with instructions, code key, and tracking/report forms.

At the same time, mail another set to the appropriate sales managers.

Within four days, mail customized letters with accompanying promotional pieces that were written and designed for response according to codes indicated on lead forms. This is an optional step and is dictated by your post-show plan.

The Follow-up Report

The report form should have been designed to provide spaces and columns to compile and recap information from the individual lead forms:

- Priority code
- Follow-up actions required
- Status of follow-up activity
- Call back dates
- Estimated sales level
- Anticipated close date

Lead Code Deciphering

Leads often contain abbreviations and check-offs that are inconsistent, illegible and indecipherable.

The code system was clearly designed and documented. The booth staff was trained on its effective use. The field staff needs to be provided with details of the coding system for easy interpretation, clarity of action indicated and required.