

PACIFIC TRAINING SOLUTIONS

SALES TRACKING & PIPELINE WORKBOOK

Log your sales, track your leads and forecast your revenue.

*A Stronger
Vanuatu Together*

What gets tracked gets managed. Use this workbook to log your sales, follow your leads through the pipeline, and keep a simple eye on where your revenue is heading.

1 WEEKLY SALES LOG

[illegible]

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Log your sales, track your leads and forecast your revenue.

2 CUSTOMER PIPELINE TRACKER



 Lead Name	 Stage	 Next Action	 Follow-Up Date

PIPELINE STAGES

New



Contacted



Qualified



Won / Lost

*Move each lead
along as it progresses.*



3 MONTHLY REVENUE FORECAST



 Month	 Expected Sales (VUV)	 Actual Sales (VUV)	 Variance



TIP:

Review your pipeline regularly and keep your forecast updated for better planning.

*Track Today
Grow Tomorrow*



How to Access the **Product Link**

Follow the simple steps below to access and customize the template with ease.



1



Click the Link

Click on the provided **Product Link** to open the template.

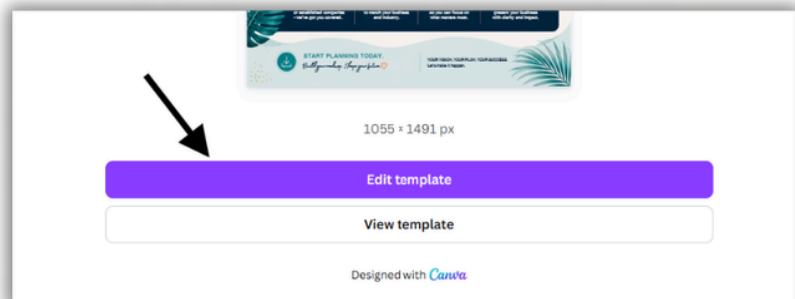


2



Click on **Edit Template**

Once the template opens, click on the **Edit Template** button.

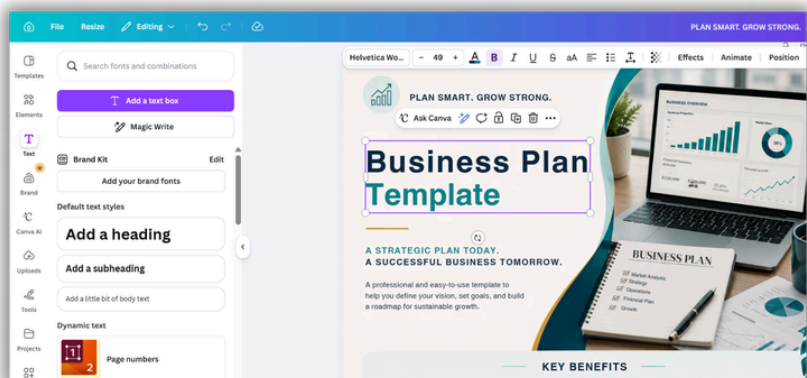


3



Edit the Template **as you want**

Customize the text, images, colors, and elements to make it your own.



Tip: Make sure you are signed in to save your changes.

Thank you!