

PROSPECTING SHEET

Company Name

Phone

Referring By

Contact Person(s)

Email Address

Initial Contact Date

Future Follow-Up Date

Notes from Initial Call

Follow-Up Contact Date

Future Follow-Up Date

Notes from Initial Call

Follow-Up Contact Date

Future Follow-Up Date

Notes from Initial Call

Follow-Up Contact Date

Future Follow-Up Date

Notes from Initial Call

(ANY ADDL. FOLLOW UP CALLS ON BACK)

POST SALE

Facility Available (Location)

Fitness Center

Conference Room

Other _____

Initial Number of Employees
Signed Up for Classes

Class Time & Start Date

Pricing

Class Day(s)

Reimbursement Program? Y / N