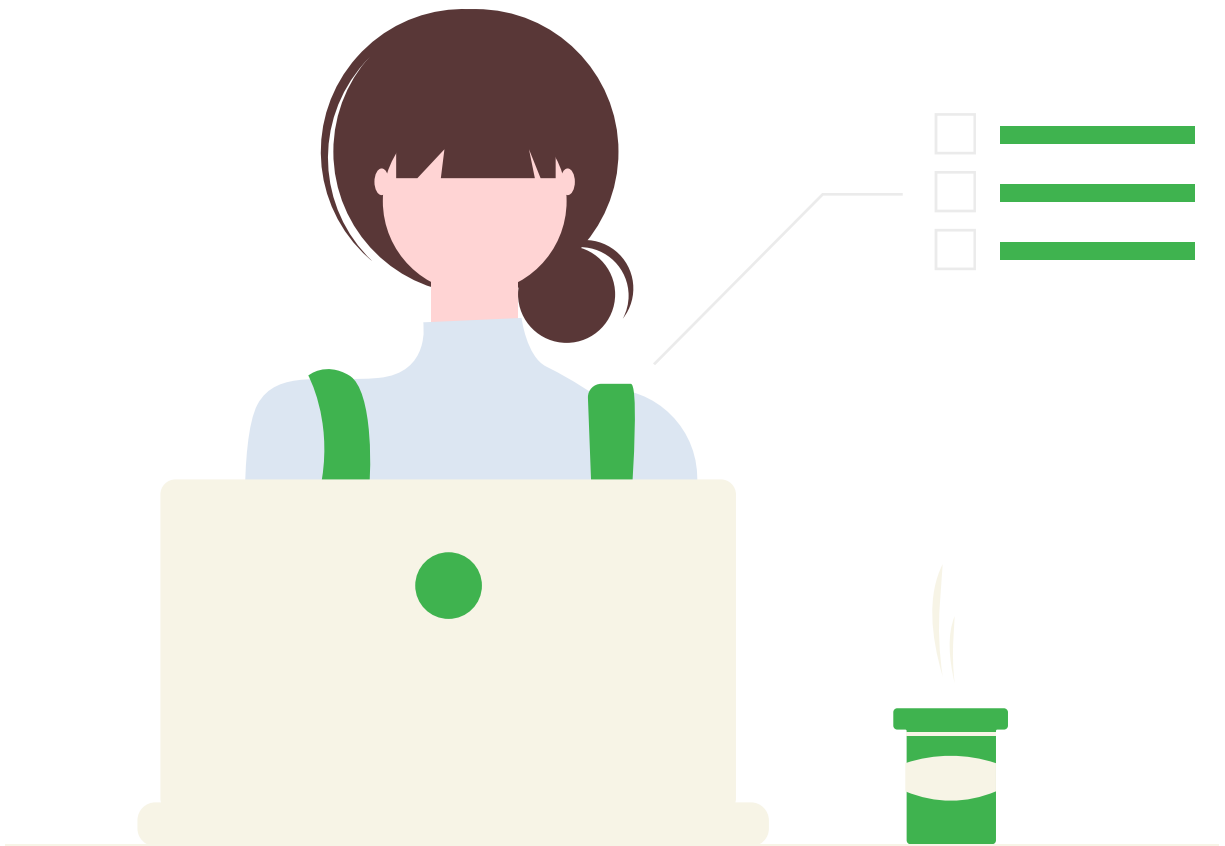




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Sales Pipeline Sheet



Keep your team on track and reach your agency goals.

In the busy hustle and bustle of the office, it can be easy for warm leads to fall through the cracks. Securing a new policyholder requires timeliness, persistence and some good old fashioned customer service.

Our sales pipeline sheet helps to ensure customers get all three!

In this resource, you'll find an editable and printable sales pipeline sheet your team members can use to keep track of their leads. Agents can also use the sales pipeline sheets to check in on their team members productivity and help them set goals. We suggest taking a peek at the sheets every week to ensure every team member is performing at their best.

Sales Pipeline

Team Member _____ Date _____

Goals				
Sales	Quote	Calls/Talk Time	Weekly Goal	Monthly Goal

Name	A	F	L	Number	Notes/Follow Up	Premium	Sold
1.							
2.							
3.							
4.							
5.							
6.							
7.							
8.							
9.							
10.							

Manager Comments





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