

Referral Tracking Sheet

Date:

Referral From / To:

Name of the person who gave you the referral, or who you gave the referral to

Referral Name:

Name of the potential customer

Phone:

Email:

Referral Details:

The products or services they want, and the level of urgency

Referral Status:

Update with the current sales pipeline stage i.e. Not Contacted, Contacted, Quoted, Closed Won, Closed Lost

Value:

Add the amount this referral is worth to you or the your referral partner
