

Partnering for growth

Lead-sharing
template

Lead summary		
Contact name		
Job title		
Authority	<input type="checkbox"/> Decision maker <input type="checkbox"/> Joint decision maker <input type="checkbox"/> Decision influencer	Purchase order sign off: <input type="checkbox"/> Yes <input type="checkbox"/> No
Company name		
Company address		
Postcode		
Website address		
Email		
Telephone		
Need	Reason for project: Key pain points:	
Timescale	<input type="checkbox"/> Small: < 150 Users <input type="checkbox"/> Medium: 150 - 1,000 Users <input type="checkbox"/> Large: 1,000+ Users	
Size		
Budget	Amount:	Owner name:

Lead summary

Target customer and account overview

Description of current IT

Background to lead (why opportunity exists)

Next steps

