

## MODULE 15 WORKSHEET

# BUSINESS DEVELOPMENT

### Potential Clients Worksheet

Use the sample spreadsheet below to fill in active potential clients and potential clients that are “on hold,” meaning that you need to follow up with them in the future.

Active Clients					
NAME	ADDRESS	EMAIL	SCOPE	INITIAL CONTACT	FOLLOW UP

  

Clients On Hold					
NAME	ADDRESS	EMAIL	SCOPE	INITIAL CONTACT	FOLLOW UP

Use a worksheet like this to keep up with potential clients, and to check in with them regularly.