

Lead Follow-Up & Sales CRM

A clear command center for leads, actions, pipeline and revenue.

TOTAL LEADS

6

ACTIVE LEADS

4

OVERDUE

0

PIPELINE VALUE

\$17,900

WEIGHTED PIPELINE

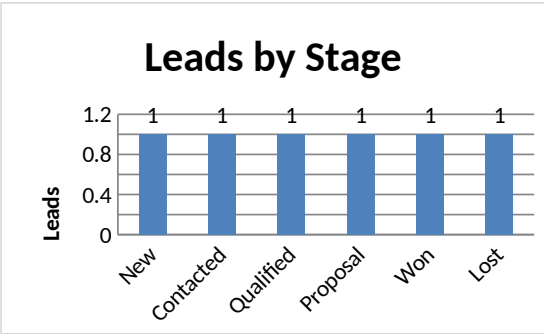
\$9,595

WON REVENUE

\$5,000

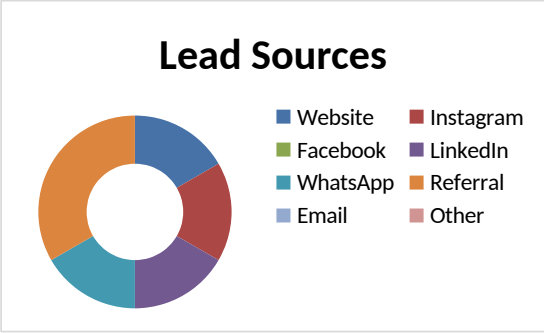
PIPELINE BY STAGE

Stage	Leads	Value
New	1	\$4,200
Contacted	1	\$1,800
Qualified	1	\$2,200
Proposal	1	\$3,500
Won	1	\$5,000
Lost	1	\$1,200



LEAD SOURCES

Source	Leads
Website	1
Instagram	1
Facebook	0
LinkedIn	1
WhatsApp	1
Referral	2
Email	0
Other	0



Lead Follow-Up & Sales CRM

A simple operating rhythm for turning opportunities into closed deals.

THE PLANVORA SALES JOURNEY

01

CAPTURE

Add every opportunity

02

QUALIFY

Score fit and intent

03

FOLLOW UP

Protect momentum

04

PIPELINE

See every deal

05

CLOSE

Track revenue

06

RETAIN

Create the next step

QUICK START • Add leads → Set the next follow-up → Update the stage → Review the Dashboard

NON-NEGOTIABLE RULE

Every active lead needs a clear next action and date. If there is no next action, the opportunity can disappear.

Replace the sample rows with your own leads. Use Settings to edit the dropdown options once, then use them everywhere.

Lead Database

Capture, qualify and organize every opportunity in one place.

[illegible]

Follow-Up Queue

A focused action list for keeping opportunities moving.

[illegible]

Follow-Up Scripts

Adaptable messages for the moments that most often lose momentum.

Stage	Use When	Script	Personalize	CTA
First Follow-Up	No reply	Hi [Name] — following up on [specific outcome]. If this is still a priority, I can send the next step and a simple recommendation.	Name • problem • outcome	Would you like me to send it?
Value Follow-Up	Add useful context	Hi [Name] — I noticed [specific issue]. One quick improvement would be [tip]. I can show you how I'd approach it for [Company].	Observation • tip	Want the quick outline?
Proposal Follow-Up	Proposal sent	Hi [Name] — checking in on the [project] proposal. The key outcome is [result]. Happy to clarify or adjust scope.	Project • outcome • objection	Anything you'd like clarified?
Objection Response	Price hesitation	Totally understand. If budget is the concern, we can simplify the scope and focus on [highest-impact deliverable] first.	Constraint • priority	Would a lean version help?
Warm Reactivation	Old lead went quiet	Hi [Name] — it's been a while. If [original goal] is back on the list, I'd be happy to suggest a simple next step.	Past context • trigger	Is this still relevant?
Lost Lead Reopen	Past opportunity	Hi [Name] — I was reviewing past conversations and thought of [specific need]. If priorities changed, I can share a fresh option.	Past need • new context	Worth revisiting?
Decision Follow-Up	Close to deciding	Hi [Name] — before you decide, here's the one thing I'd prioritize: [key value]. If you're ready, we can start with [next step].	Value • start step	Shall we move forward?
No-Pressure Close	Final touch	Hi [Name] — I'll close the loop for now so I don't clutter your inbox. If [goal] becomes a priority later, feel free to reach out.	Goal • timing	Keep this for later.
Referral Request	After a win	Hi [Name] — I'm glad we achieved [result]. If you know someone dealing with [problem], an introduction would mean a lot.	Result • ideal referral	Who comes to mind?
Retention / Next Step	Project complete	Hi [Name] — now that [project] is complete, the next opportunity I see is [ongoing need]. I can map a simple next phase.	Result • next opportunity	Want a next-step plan?

Weekly Sales Review

A 15-minute operating rhythm for learning what moved revenue forward.

Week Starting	2026-09-07
New Leads	0
Leads Contacted	0
Follow-Ups Logged	4
Proposals Sent	0
Deals Won	0
Won Revenue	\$5,000
Pipeline Value	\$9,595
Top Source	
Best Performing Offer	
Biggest Bottleneck	
One Experiment Next Week	

WEEKLY REVIEW • Change the week-start date in C6; KPI rows update automatically.

REVIEW QUESTIONS

What created the most qualified leads?	
Where did follow-up stall?	
Which objection appeared most often?	
Which source produced the best opportunities?	
What should be repeated next week?	
What should be stopped?	

System Settings

Edit these lists once — dropdowns across the CRM stay consistent.

LEAD STATUS	TEMPERATURE	LEAD SOURCE	PRIORITY	FOLLOW-UP CHANNEL
New	Hot	Website	High	Email
Contacted	Warm	Instagram	Medium	WhatsApp
Qualified	Cold	Facebook	Low	Phone
Proposal		LinkedIn		DM
Won		WhatsApp		Meeting
Lost		Referral		
		Email		
		Other		

PLANVORA DESIGN SYSTEM

Deep Green • Ivory • Sage • Gold

Edit the lists above once — dropdowns stay consistent.