



HOW TO USE THIS TEMPLATE

Sales Lead Sheet

WHAT IT IS

A 25-door canvassing log where reps record every door knocked — address, result, roof notes and follow-up — so managers can see real activity and reps never lose a lead.

WHO USES IT

Door-to-door sales reps; reviewed by sales managers.

WHEN TO USE IT

Every canvassing session — one sheet per 25 doors.

Step by step

- 1 Fill in your name, date, and the times you started scouting and knocking.
- 2 Log each door on its own line with the result code and any roof notes.
- 3 Mark whether the lead is entered in the CRM.
- 4 Sign and date when the sheet is full or the day ends.
- 5 Send your manager a photo of the sheet and keep the original for follow-ups.

Page 1 preview of the editable Word template (1 page).

WHAT'S INCLUDED

- ✓ Editable Word (.docx)
- ✓ This how-to guide (PDF)
- ✓ Real text & tables — no images to trace
- ✓ Prints on US Letter



Tips from the field

- Re-knock 'no answer' doors on a different day and time.
- Use the same result codes as the rest of the team.
- Managers: sheets show effort even on days with no sales.

Customize it with your company name & logo

- 1 Swap the logo: open the .docx in Microsoft Word, double-click the header, right-click the ACME logo and choose **Change Picture** (or delete it and Insert › Pictures). Keep it about 0.5–0.7" tall.
- 2 Replace the sample company details: press **Ctrl+H** (Find & Replace) and replace **ACME Roof Pros, 123 Main Street, Suite 100, Anytown, ST 00000, (555) 555-5555, info@acmerooftpros.com, www.acmerooftpros.com** and **License # 000000** with your own. Check the header and footer too.
- 3 Match your brand: select text and change the font or color, or edit the Heading styles once to update the whole document. Tables and fill-in lines are real Word tables, so rows can be added or removed.
- 4 Save a master copy as a Word Template (**File › Save As › Word Template (.dotx)**) so every new copy starts clean, then **File › Export › PDF** for a print-ready or email-ready version.

All names, addresses, phone numbers and figures shown in the template (ACME Roof Pros, John Doe, Jane Smith, 123 Main Street, (555) 555-5555, etc.) are fictitious placeholders for you to replace.