Document 6: Success Metrics Tracking

Track For Each Meeting

Pre-Meeting

- ☐ Business name and type
- ☐ Meeting date and duration
- ☐ Their current systems
- ☐ Estimated business size (monthly revenue)

During Meeting

- ☐ Main pain points mentioned (top 3)
- ☐ Budget signals
- ☐ Decision maker? (Yes/No)
- ☐ Timeline for decision
- ☐ Objections raised

Post-Meeting

- ☐ Meeting outcome: (Hot Lead / Warm / Cold / No)
- ☐ Follow-up scheduled? (Date)
- ☐ Probability of closing: (0-100%)
- ☐ Lessons learned

Weekly Review

Calculate:

- Meetings held this week: ___
- Hot leads generated: ___
- Proposals sent: ___
- Deals closed: ___
- Revenue pipeline: $___
- Most common objection: ___
- Conversion rate: ___% (closed / meetings)

Adjust:

- Which pitch points resonated most?
- Which objections need better responses?
- Which industries show most interest?
- What pricing feedback are you getting?