

Investor Lead Example

Includes survey questions and verification follow up process.

Date Last Contact	
Notes	
First Name	John
Last Name	Smith
Email	johnsmith@investor.com
Phone	700166969
Date Last Email	
Confirmed Address	
Confirmed Investor	
Mailed Sample & Investor Materials	
Confirmation Call	
Meeting Scheduled	
Leads Delivered	1/3/2021
Lead Source	12-10-2020 CIF Zoom Report
Leads Selected	Company Selected Lead
Attended Webinar	Yes
User Name (Original Name)	John Smith
First Name	John
Last Name	Smith
Email	johnsmith@investor.com
Address	123 Street
City	Los Angeles
Country/Region	USA
Zip/Postal Code	90501
State/Province	Other
Phone	7700166969
Industry	Medical, Pharma, Biotech

Organization	Swiss Cannabis
Job Title	CEO
Registration Time	12/2/2020 11:08
Approval Status	approved
Join Time	12/10/2020 11:04
Leave Time	12/10/2020 14:58
Time in Session (minutes)	234
Are you an investor?	Yes
Are you a source of Capital?	Yes
Are you raising capital?	Yes
Do you have experience raising capital?	Yes
Would you like to be an Investor Judge for upcoming events?	Yes
Are you ready to invest this month if you learn of a good investing opportunity?	Yes
What is the amount you as an individual or your company typically invest?	\$100,001 to \$500,000
What Stage is your company in?	\$5,000,001 to \$50 million annual revenue
Would you like an invitation to participate or attend the Cannabis Investing Forum event March 4, 2021?	Yes - Participate as Speaker, Panel, Investor Judge, Company Raising Capital
Would you like to receive free samples of CBD products?	Yes - please send to mailing address provided
Country/Region Name	United States
Source	12-2020 Cannabis Investing Forum Zoom Report