

# Prospect Pipeline Tracker - Filled Example

Completed example: Jordan Lee for Riverside Council | Prepared September 15, 2026

A completed fundraising call-time and prospect-management example showing preparation, asks, outcomes, follow-up, and pipeline forecasting.

## Call-time block

| Field             | Completed entry                                |
|-------------------|------------------------------------------------|
| Date / time       | September 16, 2026 - 4:30-6:00 PM              |
| Candidate         | Jordan Lee                                     |
| Call-time manager | Lena Brooks                                    |
| Block goal        | \$7,500 pledged / 24 completed calls           |
| Completed         | 22 calls / \$8,200 pledged / \$5,700 collected |

## Completed call sheet

| Prospect       | Relationship / context                                           | Ask     | Outcome                      | Next action                                       |
|----------------|------------------------------------------------------------------|---------|------------------------------|---------------------------------------------------|
| Avery Thompson | Former community-board colleague; donated \$1,000 in prior race. | \$2,500 | \$2,500 pledged              | Send secure link tonight; call Sept. 18 if unpaid |
| Morgan Ellis   | Local business owner; attended launch.                           | \$1,000 | \$750 paid                   | Thank-you call Sept. 17                           |
| Taylor Brooks  | Neighbourhood association volunteer.                             | \$500   | Wants to host 8-person event | Finance lead calls Sept. 17                       |
| Casey Martin   | Friend of candidate; no prior political giving.                  | \$750   | No answer                    | Try Sept. 19 at 12:30                             |
| Jamie Roy      | Policy supporter; asked about tax plan.                          | \$1,000 | \$500 pledged                | Send policy summary and payment link              |

## Pipeline forecast

| Stage                  | Prospects | Value    | Expected value |
|------------------------|-----------|----------|----------------|
| Research / uncontacted | 48        | \$41,000 | \$4,100        |
| Attempted              | 31        | \$28,500 | \$5,700        |
| Conversation           | 18        | \$22,000 | \$11,000       |
| Pledged                | 12        | \$13,400 | \$13,400       |
| Collected              | 27        | \$26,850 | \$26,850       |

## Call-time coaching note

Jordan's strongest calls were concise and included a specific reason for the amount. Avoid extended policy discussion before making the ask; schedule a separate follow-up where needed.

**Training note:** This is a fictional completed example. Campaigns should replace all entries with their own facts and verify jurisdiction-specific legal, finance, privacy, and election requirements with current official sources.