



TEMPLATES • EMAIL OUTREACH

# Outreach Sequence Tracker Template

A simple tracker for sequences - steps, send windows, replies, next actions, and outcomes - so follow-up doesn't fall apart.

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## What you'll get

- A spreadsheet layout (columns + dropdowns) to keep every prospect's next action visible.
- Two filled examples: cold outbound and reactivation.
- A lightweight system for timezones and send windows so you do not annoy leads.
- Optional formulas for overdue follow-ups and simple prioritization.

**Best used with:** Gmail / Google Workspace outreach, small team handoffs, and any workflow where next steps must be explicit.

## Spreadsheet layout (copy this even without the download)

Use one row per prospect. Keep it boring and consistent - the tracker works because it is easy to update daily.

Column	Purpose	Example	Notes
Prospect	Person you are contacting	Mina Patel	Name + role if useful
Company	Account / organization	PixelWorks Studio	Optional for solo outreach
Stage	Where they are in the sequence	Cold - Step 2	Dropdown (keep 6-10 values)
Step #	Sequence step number	2	Number so you can sort/filter
Last touch	Most recent send / reply date	2026-01-08	Date (not text)
Next touch	Your next planned action date	2026-01-10	Date (not text)
Send window	Preferred local time window	Tue-Thu 9:30-11:30	Short string
Timezone	Prospect timezone	America/New_York	Use IANA if possible
Owner	Who is responsible	Sam	Critical for handoffs
Outcome	Current result state	No reply	Dropdown (No reply / Interested / Not now / Closed)
Next action	What happens next	Send follow-up #2	Keep to one sentence
Notes	Context and snippets	Mentioned referral from Alex	Optional

## Suggested dropdowns

Field	Keep it simple (example values)
Stage	Cold - Step 1, Cold - Step 2, Cold - Step 3, Reply - Working, Warm - Follow-up, Closed
Outcome	No reply, Interested, Not now, Bad fit, Closed - Won, Closed - Lost

## Filled examples (two scenarios)

The goal is momentum: every row must have an owner, a next touch date, and a clear next action.

### EXAMPLE 1 • COLD OUTBOUND (Mina Patel)

Step	Last touch	Next touch	Outcome	Next action
1	2026-01-06	2026-01-08	No reply	Follow-up #1 (short bump + question)
2	2026-01-08	2026-01-10	No reply	Follow-up #2 (1-liner case study + CTA)
3	2026-01-10	2026-01-15	No reply	Close-the-loop email (permission + last try)

### EXAMPLE 2 • REACTIVATION (OLD LEAD)

Step	Last touch	Next touch	Outcome	Next action
1	2026-01-07	2026-01-09	No reply	Reactivation email (what changed + 2 options)
2	2026-01-09	2026-01-13	Not now	Set reminder for the date they mentioned
3	2026-01-13		Closed - Lost	Archive + note reason (timing)

## How to use it (10 minutes per day)

- 1 **Capture:** add new prospects the moment you send the first message.
- 2 **Schedule:** always set *Next touch* - if it is blank, it will be forgotten.
- 3 **Work the list:** filter for Next touch in the next 7 days (and overdue).
- 4 **Close the loop:** update outcome when you get a clear yes/no/not now.

## What to track (and what not to track)

Track the minimum that eliminates ambiguity: next action, next touch date, owner, and outcome.

Track	Do not track
Next touch date, owner, and one clear next action	Every micro-message or every open/click metric
Timezone + send window (if your outreach is global)	Long notes that nobody reads
Outcome states that lead to decisions	20+ stage values that nobody agrees on
A link to the thread if you need context	Custom fields you never filter on

## Helpful Google Sheets formulas (optional)

Assume E = Last touch and F = Next touch for the example formulas below.

What	Formula (example)	Why
Days since last touch	<code>=IF(\$E2=" ", "", TODAY()-\$E2)</code>	Quickly spot stale rows
Overdue follow-up?	<code>=IF(AND(\$F2&lt;&gt;"", \$F2&lt;TODAY()), "OVERDUE", "")</code>	Flag missed follow-ups
Next touch this week	<code>=IF(AND(\$F2&gt;=TODAY(), \$F2&lt;=TODAY()+6), "This week", "")</code>	Simple prioritization

## Deliverability and team sanity (practical notes)

- If you are sending more, slow down first. Consistency beats volume for replies.
- Use timezones and send windows to reduce spam signals and bad first impressions.
- If your team starts missing next touches, reduce stages and simplify outcomes - do not add process.

## Related templates

- Google Workspace CRM / Gmail campaign setup checklist
- Email deliverability checklist
- Design rate card template
- Billable utilization calculator