

Customer Contact Worksheet

Contact Type (circle): *Current* *Prior* *New* *Referral*
 Customer *Customer* *Prospect* *Source*

Contact Description:

| Month | Day | Format* | Content/Message |
|-------|-----|---------|-----------------|
| Jan | | | |
| Feb | | | |
| Mar | | | |
| Apr | | | |
| May | | | |
| Jun | | | |
| Jul | | | |
| Aug | | | |
| Sep | | | |
| Oct | | | |
| Nov | | | |
| Dec | | | |

Additional Personalized Contacts (check any that apply):

- Anniversary of doing business
- Birthday
- Thank you for referral
- Initial meeting follow-up
- Other:

- Instructions:**
1. Create a Customer Contact worksheet for each Contact type above. Circle the type of contact and write a brief description.
 2. Put in the dates and descriptions of contacts that are already in place.
 3. Fill in the "holes" with reasons to contact like information, maintenance suggestions, etc.
 4. Choose a variety of formats for contact

**Format: e-newsletter, direct mail, phone call, personal note/card, email alert, specific/tailored email*



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5. Decide on any additional personalized contact

**Format: e-newsletter, direct mail, phone call, personal note/card, email alert, specific/tailored email*

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