

# CUSTOMER RELATIONSHIP MANAGEMENT CHART

Quarterly Account Overview • Confidential

Date: \_\_\_\_\_

CLIENT NAME / COMPANY	ACCOUNT MANAGER	RELATIONSHIP STATUS	LAST CONTACT	STRATEGIC NEXT STEPS
<b>Global Tech Solutions</b> Key Account	Sarah Jenkins	<b>Growth Phase</b>	Oct 12, 2023	Schedule Q4 executive briefing; present expansion proposal for Cloud services.
<b>Summit Retail Group</b>	Michael Chen	<b>Stable</b>	Oct 05, 2023	Routine maintenance check; confirm renewal for annual software license.
<b>Nova Logistics Ltd.</b>	Sarah Jenkins	<b>At Risk</b>	Sept 28, 2023	Address technical support bottlenecks; schedule face-to-face reconciliation meeting.
<b>Riverstone Banking</b> Enterprise	Elena Rodriguez	<b>Onboarding</b>	Oct 14, 2023	Finalize API integration parameters; introduce dedicated support lead.

## NOTES & PRIORITIES

Record overarching relationship goals and monthly performance KPIs here...