

CRM CLIENT TRACKER

Weekly Relationship Management Log

Date Range: _____
Account Manager: _____

CLIENT / COMPANY	CONTACT PERSON	LEAD STATUS	LAST CONTACT	NEXT STEPS / FOLLOW-UP NOTES
Acme Corp	John Doe	Active Prospect	Oct 24, 2023	Send revised proposal by Thursday.
Global Tech	Sarah Smith	Negotiation	Oct 22, 2023	Waiting for legal team review of contract.

PRIORITY GOALS FOR PERIOD

1.

2.

3.

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