



# Customer Relationship Management

Information To Capture	What To Do With It
Name	Not only should you know the contact's name, but you should know how to properly pronounce it and how people normally like to be called (often someone whose name is 'Robert' prefers to be called 'Bob').
Contact Information	How do you reach this customer? This could be the physical address, mailing address, email address, phone number, fax number, and cell. There are more and ways to communicate with each other, so another important thing is to know how best to reach these individuals (and often WHEN to contact them).
Roles/Titles	There is often more than one contact at an organization that needs to know about your company and what you do in order for your product or service to integrate properly. Make sure that you know who these people are.
Family or Interests or Personal Information	This allows you to build a relationship. By capturing this and reviewing this information prior to meeting someone face to face, you are able to show that you listened to them, remembered what they said, and care. Some companies send out anniversary or birthday cards to their customers. This can go a long way to strengthening your relationship with your customer.
Last Contact / Next Contact	Following up with someone is one of the most important things in moving a sale forward or ensuring that your existing clients are happy. Knowing that you are following up regularly without pestering the customer is important.
Conversation Notes	What did you talk about the last time you spoke? What is the progression of the relationship? How have things moved forward? Or backward? This is good information in terms of strategy for the next time that you reach out to them.
Product/Service Preferences	What types of products/services do they currently use? Do they require customization? How often do they buy? This information can be useful in understanding the value of the customer.
Complaints/Customer Satisfaction	How does this customer view your company? Do they complain a lot? Refer you? This will give you a general feel to how your company is doing in terms of customer service and also how hard you may have to work in order to retain a customer.