

YOUR TOUCH POINT ADVANTAGE



CUSTOMER DATA WORKSHEET

INDIVIDUALS INVOLVED IN PLANNING		TARGET DATES
Name: _____		Date Planning Started: _____
Name: _____		Date Plan Review: _____
Name: _____		Date Plan Completion: _____
Name: _____		Date Activity Starts: _____
Name: _____		Date Activity Completed: _____

HOW ARE YOU ALREADY USING REPORTS AND OTHER DATA FOR MARKETING?

HOW CAN WE EXPAND THE USE OF REPORTS & OTHER DATA ALREADY BEING GENERATED?

ADDITIONAL REPORTS NEEDED FOR MARKETING:

HOW REPORTS WILL BE GENERATED & BY WHOM:

GOALS TO ACHIEVE - USING CUSTOMER DATA:

ACTION STEPS

ASSIGNMENTS
