CRM ACTION PLAN TEMPLATE

CUSTOMER RELATIONSHIP MANAGEMENT

Format No.:

Job I.D. Number: _____

Job Started Date: _____   Completion Date: _____

Purpose of Establishment: _____

_____

Action Plan	Target Date	Actual Date	Priority	Status

Target Segment:

- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____

Applications & Customers:

- ➤ _____
- ➤ _____
- ➤ _____
- ➤ _____

Goal

Executive – Marketing   Manager - Marketing