

Recording your customer contact history

In any business it is important that you have a single, organised system to keep record of customer interactions. Not only does this enable you to better predict sales in the future, but it also safeguards your business in the future in the case of an unforeseen circumstance in which an employee with the customer knowledge is lost.

Let's analyse and evaluate your business and identify ways that you can take steps toward safeguarding your customer contact information.

Do you know at any given moment what your sales for the coming months might be?

How do you predict sales?

Do you set targets for each month?

Do you track every open opportunity that your business generates?

Do you understand the concept of a 'sales pipeline'? If not, investigate what this means and how it might relate to your business.

Is there a system in place for follow-up to continue, even if a particular staff member forgets or is no longer available to follow up?