

COMPANY:_____ 12-MONTH PERIOD: _____ DATE:_____

ACTIONS BY CUSTOMER



MAKE MORE \$\$\$ FROM EXISTING CLIENTS

- _____
- _____
- _____
- _____



GENERATE NEW CLIENTS

- _____
- _____
- _____
- _____



REVITALIZE LAPSED CLIENTS

- _____
- _____
- _____
- _____

BIG STAKES IN THE GROUND:

★ **JANUARY**

CRG: \$ _____

★ **FEBRUARY**

CRG: \$ _____

★ **MARCH**

CRG: \$ _____

★ **APRIL**

CRG: \$ _____

★ **MAY**

CRG: \$ _____

★ **JUNE**

CRG: \$ _____

★ **JULY**

CRG: \$ _____

★ **AUGUST**

CRG: \$ _____

★ **SEPTEMBER**

CRG: \$ _____

★ **OCTOBER**

CRG: \$ _____

★ **NOVEMBER**

CRG: \$ _____

★ **DECEMBER**

CRG: \$ _____