

Client Details

Contact: **Cindy** Prospect Num: **8**

Client Type: Corporate No Promotions:

Company: **ABC Corporation**

Contact: Cindy Smith Office Phone: 555-555-5555

Contact Title: Safety Committee Member OfficePhone2:

Email: Fax:

Cell / Pager: Client Notes:

Street: 123 Main Street They make widgets, have an AED

City / State: Anytown NJ 05050

Log Date	Promotion Activity	Follow Up Date
2/10/2009	Cindy called: Needs renewal for CPR/AED	2/11/2009
2/11/2009	Sent quote by email	2/25/2009
2/26/2009	Called Cindy, left voicemail about scheduling	3/1/2009
2/27/2009	Cindy called, said she is waiting for approval	3/2/2009
* 5/28/2009		

Record: 1 of 4

Add To Client List Listed As Client **Close Form**

Make relevant notes about the client's site

Update activity as you go back-and-forth with a potential client

If you close the sale, add the prospect to your TCM client list with one click of a button