

Customer Information Card

Contact

Name: _____
Preferred Contact: Email Text Call
Email: _____
Phone: _____
Address: _____

How They Found You:
 Craft Show Social Media Referral
 Website Other: _____

Interests

Likes: _____

Size Pref: S M L XL
Notes: _____

Follow-up
Last: _____ / Sale Check-in
Next: _____ / Reason:

Addition Notes:

Purchase History

1st: _____
\$ _____
2nd: _____
\$ _____
3rd: _____
\$ _____

Personal

Key Dates (Birthdays/Anniversaries):

Future Opportunities

Referrals Given: Yes No
Referral Names:

Expressed Interest In:

Potential Commission Ideas:

Budget Range Indicated:
\$ _____ - \$ _____
Timeline: Immediate 3-6 months
 6-12 months Future/Unspecified