Customer Follow-Up Tracker

Keep order follow-ups timely. Record only the customer information you truly need.

FOLLOW-UP RECORD

Order ID / date	Customer / channel	Reason / next action	Due date	Done

FOLLOW-UP IDEAS

- [ ] Confirm delivery or pickup and ask whether the wreath arrived as expected.
- [ ] Thank the customer and offer help with hanging or care instructions.
- [ ] Ask for a review or photo politely, without pressuring the customer.
- [ ] Record special requests or promised answers so nothing is forgotten.
- [ ] Send product promotions only where you have appropriate permission.

Keep this log secure. Avoid storing payment-card details or unnecessary sensitive information. A previous purchase does not automatically mean permission to send marketing messages.

Customer Follow-Up Tracker

A second reusable log page for ongoing follow-ups, custom leads, and repeat orders.

ADDITIONAL FOLLOW-UP RECORDS

Order ID / date	Customer / channel	Reason / next action	Due date	Done

FOLLOW-UP REVIEW

Week reviewed

Open items

- ☐ Resolve overdue service follow-ups first.
- ☐ Close completed items and update any outstanding custom requests.
- ☐ Remove outdated or unnecessary customer information when no longer needed.

NOTES / PROMISES TO KEEP