CRM log — 7 fields and their source

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What is written, what is never overwritten · fictional document

Fictional document — demonstration example

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Fictional document, produced for the demonstration. **A CRM is a shared memory: what goes into it ends up in front of the customer the day they ask what the company holds about them.** That is the very practical reason why the agent writes only dated, sourced facts.

The seven fields the agent writes

Field	Content	Source
Sequence step	D+0, D+3, D+8, D+15 or exit	Sending platform
Last contact	Date, time and channel	Sending platform and short-message gateway
Next message	Date scheduled	Sequence cadence
Score and its detail	Out of 100, block by block	**Every point carries the line that produced it**

Field	Content	Source
Original sentence	The prospect's enquiry, quoted word for word	Form, email or show record
Exit status and grounds	Reply, opt-out, quotation opened, existing customer	Stop rules
Link to the message sent	**The exact text the prospect read**	**So the salesperson reads what their prospect read before picking up the phone**

What makes the record readable in front of the customer, and what protects the salesperson's note

Rule	Example	Reason
Dated facts, never a judgement about a person	« difficult customer », « understands nothing »	A record is read in front of the customer concerned — on that day it defends you or it costs you
An intention is recorded only if the prospect stated it, quoted word for word	« does not want to buy »	**An unsourced supposition distorts the score of every later lead**
The agent's note goes beside the human's, dated	« call back after the holidays », noted by a salesperson	**The salesperson's stands: what they understood of their customer is never lost**

The figure the agent publishes about itself in the first month, its cause and its fix

Measurement	First month	After the fix	What changed

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Opt-outs, « purchasing » segment	**3.1 %**	**0.7 %**	Job titles sorted by the sales director, then a message written for the purchasing role: total cost of ownership, contract term, trade-in conditions
Opt-outs, all other segments	0.6 %	0.6 %	Unchanged — **so it was not the message in general**
Reply rate on the « purchasing » segment	4.8 %	**11.2 %**	**The most fragile segment became the one that improved most**

The cause was neither the message nor the configuration: it lies in the way these people write their own job title. In this market a buyer rarely introduces himself as a buyer — « fleet manager », « supply lead », « fleet officer » —, and the grid filed those titles under logistics because that is what they say word for word: those people therefore received the text written for a logistics manager, parts availability, when their job is price. **Publishing that figure before anyone asks is what allows it to be fixed in a fortnight rather than a quarter.**

Additional fields the sales director wants populated: _____

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