Relationship tracker

Keep the people and the next step together.

Name / role / organization

Contact details / preferred channel

How we met / shared projects

Last conversation / date

What I can help with / current opportunity

Next action / follow-up date

BEFORE YOU CLOSE THE SESSION

1. Use one sheet per contact.
2. Record useful context and the follow-up you actually agreed to.
3. Review open follow-ups once a week.