SALES VISIT REPORT

Your memory for the customer relationship · Template by Acto (heyacto.com)

1 · BASIC DETAILS

Date		**Time / duration**	
Customer / company		**Customer number**	
Location / address		**Sales rep**	
Visit type	☐ First visit ☐ Follow-up ☐ Complaint ☐ Trade fair		

2 · CONTACT PERSON

Name		**Position / role**	
Decision-maker?		**Email / phone**	

3 · TOPICS DISCUSSED & MEETING CONTENT

Keywords are enough: 3 to 5 key points from the meeting

4 · AGREEMENTS & COMMITMENTS

#	Agreement	Who	By when	Status
1				
2				
3				
4				

5 · NEXT STEPS & FOLLOW-UP DATE

Every report ends with a concrete next step and a date to follow up

6 · MOOD & ATMOSPHERE

☐ Very open ☐ Open ☐ Neutral ☐ Reserved ☐ Sceptical ☐ Stressed

7 · PERSONAL INFO & CASUAL REMARKS *

Planned investments, refurbishments, new locations, personal milestones, trouble with suppliers: anything that could turn into revenue in 6 to 18 mont

8 · SIGNALS: CHURN, CROSS-SELL, ESCALATION

☐ Churn risk ☐ Cross-sell opportunity ☐ Upsell opportunity ☐ Escalation needed

The template captures what you know. Acto makes sure it comes back at the right time: recorded by voice, synced to your CRM, surfaced as a reason to visit.
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