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LANGUAGE & CONTACT SERVICES
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Sample CRM Record

Sales & Customer Support | Citadel Language & Contact Services LLC

ILLUSTRATIVE ONLY. All names, activities and outcomes are fictional. This example demonstrates a workflow; it is not a CLCS client result or testimonial.

1. Prospect & Call Record

CRM field	Fictional entry
Record / stage	SIM-014 | Discovery scheduled. Updated 16 Oct 2026, 11:18 a.m. ET.
Prospect / buyer	Maple Harbor Home Services | Alex Morgan, owner. Fictional business and contact; no live contact details.
Campaign / rep	Service-business lead response | Demo Rep A | English. Offer: missed-call response, booking and lead tracking.
Activity / source	Outbound call: 16 Oct 2026, 11:10 a.m. ET. Client-provided sample list. Time zone: America/New_York (ET).

2. Qualification & Call Notes

Owner returns missed inquiries between jobs; some wait until the next day. An agency handles advertising, while the owner manages inquiry follow-up. Buyer asked how the offer fits the agency. Rep explained the follow-up focus; provider must confirm technical fit and pricing.

Qualified: decision maker confirmed; delayed response identified; interested in exploring this month; 15-minute discovery meeting accepted.

3. Next Action & Handoff

Appointment: 20 Oct 2026, 2:00 p.m. ET; 15-minute provider discovery call.
Owner / deadline: Demo Rep A sends confirmation and buyer notes by 16 Oct, 3:00 p.m. ET. Provider closer owns discovery, fit assessment and pricing.
Contact preference: email confirmation; no further call before the appointment. No opt-out requested.
Outcome: appointment booked. Sale and payment status not reported.

Campaign-specific qualification / CRM changes

Handoff owner / response deadline

Sample Weekly Performance Report

Sample week: 12-16 Oct 2026 | One fictional representative | Cutoff: 16 Oct, 5:00 p.m. ET (America/New_York).

SIMULATED DATA. Figures below are examples, not CLCS results, targets or promises. Use agreed CRM, dialer and client sales records for an actual report.

1. Activity & Outreach Outcomes

The 60 reached, 20 qualified and 12 booked leads are nested subsets of the same 200 leads attempted this week. Outcomes are measured at the cutoff.

Measure	Sample	Counting rule
Hours worked	20.0	Recorded campaign work; sample only.
Call attempts	300	All outbound attempts; repeated calls included.
Leads attempted	200	Distinct lead IDs with at least one call attempt.
Leads reached	60	Distinct leads with a live buyer conversation; count once.
Qualified leads	20	Reached leads meeting the campaign qualification rules.
Discovery booked	12	Qualified leads with an accepted appointment; count once.

Reach rate: **30.0%** 60 reached / 200 attempted	Qualification rate: **33.3%** 20 qualified / 60 reached	Booking rate: **60.0%** 12 booked / 20 qualified

2. Appointments, Sales & Data Limits

Attendance: 10 appointments originally due this week, regardless of booking week: 8 held, 1 no-show, 1 rescheduled before start. Exclude the rescheduled appointment: **8 / (8 + 1) = 88.9%**. This is a separate schedule group from the outreach counts above.

Closed-won / paid sales / revenue: N/A. Provider sales and payment data were not supplied in this example. N/A means unavailable; use zero only when no events are confirmed.

3. Tailor the Report for the Pilot

Client / campaign

Report owner / source systems

Agreed success measure / target

Review decision / next action