Customer list

One line per customer. Start with last month's signups. Update it before each Monday check-in.

Business: Month: Updated by:

Name	Email / phone	Signup date	Finished setup? (Y/N)	First result date	Trial / quote ends	Paid? (Y/N)	Why stalled or left (their words)	Owner

Keep it simple. A tidy list that gets updated beats a clever system nobody opens. The "why stalled or left" column becomes the most valuable information you own.

Privacy. This list holds personal details. Keep it in a shared drive with restricted access, not on someone's desktop, and share it only with people who need it. The spreadsheet version is customer-list.xlsx.