CREATE SOCIALLY™

DISCOVER. ALIGN. GROW.

Six-Line Customer Inquiry Review

Make the next commitment clear.

Choose one open inquiry. Review your notes, complete the six lines, then clarify one missing detail before taking action.

Customer / inquiry: _____ Date: _____

1. The customer wants to:

2. We agreed to:

3. The next action belongs to:

4. The customer will hear from us by:

5. We are waiting for:

6. Our last action resulted in:

Check after the next agreed milestone

☐ The action happened.

☐ The customer received the update.

☐ The next responsibility is clear.

Next check-in: _____ Keep customer details private.

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Scan to schedule a discovery call