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| 営業日報 | | | | | | | | | | | 見込み度 | |  | | |
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| （顧客基本情報） | | | | | | | | |  | （売上履歴） | | | | | |
| 顧客名 |  | | | | | | | |  | 年月日 | | 商品 | | | 売上 |
| 住所 |  | | | | | | | |  |  | |  | | |  |
| 電話 |  | | FAX | |  | Eメール |  | |  |  | |  | | |  |
| 担当者 |  | | 部署 | |  | 役職 |  | |  |  | |  | | |  |
| 項目１ |  | | | | | | | |  |  | |  | | |  |
| 項目２ |  | | | | | | | |  |  | |  | | |  |
| 項目３ |  | | | | | | | |  |  | |  | | |  |
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| （営業・談履歴） | | | | | | | | | | | | | | | |
| 年月日 | | フェーズ | | 営業内容 | | | | 問題点とその対策 | | | | | | 次回予定 | |
|  | | 電話フォロー | |  | | | |  | | | | | | メールフォロー | |
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|  | | メールフォロー | |  | | | |  | | | | | | 訪問 | |
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|  | | 訪問 | |  | | | |  | | | | | | 提案書提出 | |
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|  | | 提案書提出 | |  | | | |  | | | | | | 見積書提出 | |
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|  | | 見積書提出 | |  | | | |  | | | | | | 電話フォロー | |
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|  | | 電話フォロー | |  | | | |  | | | | | | クロージング | |
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