Client relationship lifecycle map

Client information

Field	Details

Client name -

Industry -

Key contact -

Account manager -

Start date -

Stage no.	Stage name	What to fill in	Your input
1.	Prospecting	Number of new leads generated	
2.	Qualification	Number of leads qualified	
3.	Proposal	Number of proposals sent	
4.	Onboarding	Contract signing date	
5.	Active engagement	Number of active job orders	
6.	Client support & retention	Client satisfaction score (1-10)	
7.	Growth & expansion	Number of upsell opportunities	
8.	Renewal/repeat	Contract renewal status (Yes/No)	

How to use this template

- Fill out the client information section first to keep your records organized.
- For each stage, enter the relevant number, date, or status in the input column.
- Use this map to track your client's progress and spot areas that may need attention.
- Update regularly to keep your client relationship and revenue health visible and actionable.