



AGE
LOCATION
OCCUPATION
COMPANY
SALARY
EDUCATION
FAMILY

GOALS

-
-
-

CHALLENGES

-
-
-

PREFERENCES

LIKES

-
-
-

DISLIKES

-
-
-

TOUCHPOINTS

-
-
-
- Contact Preference:
- Access Ability:
- Last Interaction and Purpose:

History of contacts (amount, reason, result):

CUSTOMER JOURNEY

AWARENESS
CONSIDERATION
PURCHASE
RETENTION
RECOMMENDATION

CUSTOMER LIFETIME VALUE

TOTAL PREDICTED LTV:

HISTORIC VALUE:

YEAR TO DATE: