Beginning Farmer Customer Relationship Management Guide

A guide to customer relationship management for beginning farmers. It shows how to track customers, orders, and conversations so service improves over time. Use it alongside advice from local advisors.

Farm / unit: _____ Date: _____ By: _____

1. List the customer information to track
2. Choose a simple tracking tool
3. Enter new customers promptly
4. Note order history
5. Note preferences and feedback
6. Plan follow-up messages
7. Thank repeat customers
8. Protect customer data
9. Review the list often

YOUR NOTES

TIP Start with a simple spreadsheet and add tools only when you need them.