Customer Dossier  
for

*Customer Name*

**By**  
***Author's Name*  
Product Manager: *Name***

Important Note: The Customer Dossier may contain analysis and other proprietary information. This document is to be used internally only and should never be saved without a password implemented or encryption.

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| Template History |

If you edit the template, please add the date, your name, and a description of the change here. Remember that by using this template, you agree to provide any useful changes to the user community. By giving back, we make the entire Product Management community better.

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| --- | --- | --- | --- |
| **Rev. #** | **Date of change** | **Name of person making change** | **Description of Change** |
| 1.0 | 27-JAN-13 | Ashley Eckhoff | Initial public release. |
| 2.0 |  |  |  |
| 3.0 |  |  |  |
| 4.0 |  |  |  |
| 5.0 |  |  |  |

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| Revision History |

Document any changes to the document information below. The first revision should be the initial release of the information.

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| **Rev. #** | **Date of change** | **Name of person making change** | **Description of Change** |
| 1.0 |  |  |  |
| 2.0 |  |  |  |
| 3.0 |  |  |  |
| 4.0 |  |  |  |
| 5.0 |  |  |  |

*Note: Replace or delete any text in blue in this document. You will also want to delete this comment as well.*

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| Customer Background |

*This section should establish the basic background information about the customer.*

## Customer Data

Top of Form

|  |  |
| --- | --- |
| Customer Name |  |
| Customer Industries |  |
| Headquarters Address |  |
| Internal Sales Contact | *(Name, Phone, E-mail)* |
| Company Description |  |
| Company Size |  |
| Company Revenue |  |
| First purchased our software | *(Approximate Date or Year)* |
| Relationship | Cooperative/Good Fair Adversarial/Poor |
| Complementary product user? | *(List any other of our products this customer uses)* |
| Partner product user? | *(List any products from our partners that this customer uses)* |
| Competing Products | *(List any known competing products in use at this customer)* |

Bottom of Form

## Customer History & Description

*In this section, describe the customer, their history, their business, and any other relevant background information.*

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| Sold To IDs & Locations |

*Many companies assign a single customer multiple IDs associated with various offices or addresses the company owns or operates at. While good for tracking sales, this makes tracking problems, enhancements, and licenses an arduous task. In this section keep a running list of all known Sales IDs for the company and if possible, the associated address.*

|  |  |
| --- | --- |
| **Sales ID** | **Address** |
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| Licenses and License Counts |

*List any existing licenses the customer owns, the count of those licenses, and the associated sold-to ID.*

|  |  |  |  |
| --- | --- | --- | --- |
| **Product Name** | **License Number/ID** | **Sales ID / Office** | **Count** |
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|  |  |  |  |
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