

FREE RESOURCE

CRM Task Template Library

Twelve ready-to-build task templates — plus the rule for when a task should be a workflow instead.

How to use these

Build each as a task template in your CRM: name, trigger, due-date offset, default owner, and the step checklist. One-time setup; used forever.

The library

Template	Trigger	Due	Steps
New prospect logged	Inquiry received	Same day	Log source & notes; assign status/owner/next action; send acknowledgment
Post-meeting follow-up	Meeting held	+1 day	Log notes; send recap email; create next actions with dates
Pre-meeting prep	Meeting scheduled	-2 days	Pull holdings & notes; review last action items; send agenda
Birthday touch	Annual	On date	Send card/message; log the touch
Beneficiary review	Annual per client	Scheduled	Pull designations; confirm with client; update records
Document request chase	Docs requested	+5 days	Check receipt; send reminder if missing; escalate at +10
New client welcome	Agreement signed	Same day	Send welcome email; assign onboarding owner; start onboarding workflow
Transfer tracking	Transfer initiated	+7 days	Confirm receipt; follow up weekly until complete
Review scheduling	Quarterly	Scheduled	Send scheduling link; confirm 48h prior; prep assigned
Dormant prospect sweep	Monthly	1st Monday	List prospects 30+ days idle; re-engage or close out
Service request log	Request received	Same day	Log with owner & due date; resolve within 5 business days
Team handoff	As needed	Same day	Document context; name new owner; confirm acceptance

Task vs. workflow

A task is one action with one owner and one due date. A workflow is a sequence of tasks. If your "task" has more than five steps or two owners, it is a workflow — break it up.

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