

1) CRM Download (CSV)

- a) Client Name
- b) Date Acquired
- c) Source
 - i) Non-client sources will need a date associated with the relationship
 - ii) Include all sources (Google, Natural Market, etc)

2) Select a GPT

- a) AI Diagram Designer - Smart Mind Map

3) Upload your CSV to the GPT

- a) Create a network diagram visualizing the clients, their duration with the company, and their source.
- b) Edit the GPT to your specifics
 - i) Create a dot-string network diagram. Distribute horizontally. Visualize the clients, their duration with the company, and their source. Any source (dot) with three or more strings directly leading to other clients, shade green. Dots with two strings, shade yellow. State the year of acquisition (Client since) on each string.