



Sales Kit Formal Account Review





ACCOUNT REVIEW

Name of Contact:

Position:

Company Name:

Date of Review:

- ★ How did you begin dealing with us?

- ★ Have the products supplied met your requirements?

- ★ Has our technical back up met with your requirements?

- ★ Has our delivery performance met with your requirements?

- ★ Are there any areas that you are NOT happy with?

- ★ What other suppliers are you currently using?

- ★ What are your likely requirements going forward?

- ★ What do we need to do to gain more business from you?

- ★ Any other comments you wish to make?





THE ACCOUNT REVIEW PROCESS - FOR EXISTING CLIENTS

Why Review?

Obtaining continual feedback against a set of established criteria is vital if an organisation is to retain its existing top clients and seek to improve its standing and the quality of its service levels to them.

There are at least seven benefits of regular feedback:

- ★ Feedback reveals your customer's current and future plans
- ★ Seeing your business, from your customer's point of view, allows you to answer the question "would you do business with you?" - if not, why not?
- ★ Feedback allows you to tailor your service levels so that you enjoy maximum customer satisfaction at a minimum cost
- ★ If you don't ask you'll never know how you are doing until it's too late! Feedback is magnified by the 'iceberg factor' - making it more critical than it originally appears
- ★ Feedback can reveal what your competition are doing helping you to be a consistently strong contender
- ★ Gaining a reputation for wanting to hear feedback can actually make money for you





How Often?

This will depend entirely on the importance of the account and revenue levels being achieved - or anticipated.

If the feedback you have been receiving to date has not been useful, ask yourself the following questions:

- ★ Do I ask enough questions?
- ★ Do I ask the right questions?
- ★ Do I communicate effectively about why I am asking the questions?
- ★ Do I ask the right people?
- ★ Do I know how to use the data I collect?
- ★ Am organised to respond to the information?
- ★ Do I value and trust the information I receive?





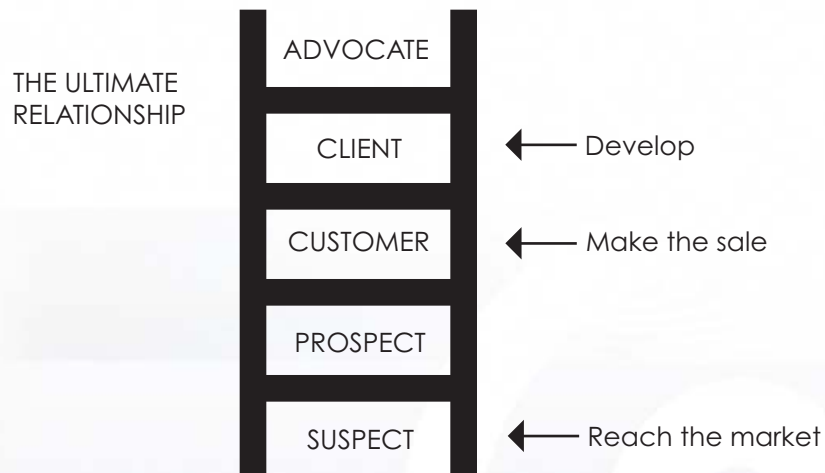
What do you do with the results?

- ★ Collating & Assessing
- ★ Communicating upwards & sideways
- ★ Acting on vital issues
- ★ Feeding back remedial actions
- ★ Confirming satisfactory resolve

REMEMBER:

The Account Review Process

- ★ Is a non-threatening meeting
 - ★ It is a fact finding session, not a sales event in the short term
- But**
- ★ It is highly likely that during this meeting you **will** uncover additional short, medium and long term opportunities and we are aiming for the “**Ultimate Relationship**”





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