

Account Management and Maximization Worksheet

Account Name:	
Your contacts inside the organization	
How long has this account been buying from you?	
What purchases have they made?	
What additional purchases could you possibly offer?	
List any referral contacts made through this account	

1. What are you currently doing for this account to demonstrate that the hard work begins after the sale?

2. What are the expectations of this customer? Have they been met? Exceeded?

3. What are some of this customer's particular needs, wants and challenges? What are you doing to demonstrate to this customer that they are important?

4. What process do you have in place to manage the details of this customer's account?

5. What is the informal structure of this account? What is your strategy for operating effectively within the informal structure without violating the formal structure?

6. What issues or problems can you anticipate that might arise within this account and what is your plan for dealing with them?

7. How can you continue to pro-actively increase your sales and positioning with this customer without being overly pushy?

8. How closely are you monitoring the billing for this account? Are you confident that it is current and correct- both from your organization and in terms of payments being received from your customer?

9. What steps have you taken to insulate this account from sudden changes within your customer's organization?

10. What are you doing to make sure that this relationship remains profitable and productive for you and your organization? What can you do to cultivate and collect testimonials and referrals from this account?
