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Exceeding Customer Expectations – One Experience at a Time℠

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**Account Management Profile Snapshot Audit**

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| **How often do the following activities occur within your company?** |
| **1 = Never** | **2 = Occasionally** | **3 = Usually** | **4 = Frequently** | **5 = Always** |
|  |
| The company has a well-defined set of customer segments that includes Accounts (Tier I – Tier II – Tier III) and Contacts (Decision Maker – Recommender – Influencer) |  |
| Customer feedback from all customer touchpoints is collected, analyzed, dispersed throughout the company |  |
| Customer feedback is integrated throughout key processes product development – marketing – customer service |  |
| Customer satisfaction benchmark metrics are reviewed and treated as importantly as financial metrics |  |
| Customer feedback is reviewed and acted upon |  |
| **Category #1: SEGMENTATION/ SURVEY / BENCHMARK Total** |  |

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| --- | --- |
| Employee perception of customer satisfaction/loyalty is compared to actual customer ratings |  |
| A meaningful portion of employee compensation is based on customer satisfaction / loyalty ratings |  |
| The company provides ongoing customer relationship certified training for employees |  |
| The company celebrates, and rewards employees based on customer satisfaction / loyalty ratings |  |
| Human Resources actively gathers employee feedback and acts upon the results |  |
| **Category #2: EMPLOYEE ENGAGEMENT** |   |

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| --- | --- |
| The company has formal frequently schedule review of corrective action results |  |
| The company establishes an easily understood corrective action process |  |
| The company establishes an easily understood set of support standards |  |
| The company surveys customers and utilizes analytics to identify the key performance indicators |  |
| The company annually reviews / revises their support standards |  |
| **Category #3: CORRECTIVE ACTION / CX ANALYTICS / SUPPORT STANDARD Total** |  |

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| --- | --- |
| The company seeks independent 3rd party Validation / Recognition of providing exceptional customer service |  |
| The company uses Customer Bill of Rights methodology to guide employees in customer financial decisions that will result in increased customer loyalty |  |
| The Chief Customer Officer regularly reports customer feedback / corrective action results to the President / CEO and executive staff |  |
| The company agrees to provide goods and services that will consistently exceed their customer’s expectations and to provide their employees a workplace which motivates and where employees are trained and skilled in customer relationship, customers are valued, and relationships are maximized |  |
| A meaningful portion of executive compensation is based on customer satisfaction / loyalty ratings |  |
| **Category #4: INDEPENDENT 3RD PARTY VALIDATION – RECOGNITION / CUSTOMER BILL OF RIGHTS Total** |  |

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| --- | --- |
| The company conducts internal reviews to determine how to maximize the value of your products / services to the customer |  |
| The company recruits AMP team members who are responsible for identifying how to maximize the value of our products / services resulting in financial benefits to the customer |  |
| The company identifies value added benefits (decreased costs - increased productively – increased revenue – technology leadership – etc.) to the customer |  |
| The company conducts formal customer partnership reviews and identifies CSAT levels – corrective action – value added benefits provided both current and past 12 months of history |  |
| The customer is asked to rate the level of satisfaction with our partnership contribution as to maximizing the value of our products/services resulting in financial benefits to the customer |  |
| **Category #5: PARTNERING 4 SUCCESS Total** |  |

 **Overall Category Totals**

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| --- | --- |
| **Individual Category Competency Totals:****5 to 10 Failure****11 to 14 Poor****15 to 19 Average****20 to 25 Excellent** | **Overall AMP Rating: All five (5) categories****Less than 50 Non-Existent AMP Strategy****50 to 59 Very Low** **60 to 84 Reactive** **85 to 99 Engaged** **100 to 125 AMP Centric – Key part of Company’s DNA**  |

**Please select the industry segment that best fits your company**

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| * **Telecommunications**
 | * **Financial Services**
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| * **Medical Hardware**
 | * **Retail / Hospitality/ Real Estate**
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| * **Medical Suppliers**
 | * **Hospital / Clinics**
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| * **Medical Services / Healthcare**
 | * **Transportation**
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| * **Semiconductor**
 | * **Waste Management Services**
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| * **Computer Software**
 | * **Bio Tech / Life Sciences**
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| * **Computer /Peripherals/ Wireless**
 | * **Internet / Mobile Technology**
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| * **Analytical Device Equipment**
 | * **Pharmaceuticals**
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| * **Test / Measurement Equipment**
 | * **Entertainment**
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| * **Energy / Utilities**
 | * **Chemical / Packaging**
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| * **Construction**
 | * **Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
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