**A picture containing clipart

Description automatically generatedA close up of a logo

Description automatically generated**

Exceeding Customer Expectations – One Experience at a Time℠

P. O. Box .323, Chelmsford, Massachusetts 01824

Tel: 978-710-3278 / [www.crmirewards.com](http://www.crmirewards.com)

**Account Management Profile Snapshot Audit**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **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** | | | | |  |

|  |  |
| --- | --- |
| 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** |  |

|  |  |
| --- | --- |
| 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** |  |

|  |  |
| --- | --- |
| 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** |  |

|  |  |
| --- | --- |
| 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**

|  |  |
| --- | --- |
| **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**

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