



## Account Management Profile (AMP) 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				
<b>Category #1: SEGMENTATION/ SURVEY / BENCHMARK</b>				<b>Total</b>
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				
<b>Category #2: EMPLOYEE ENGAGEMENT</b>				<b>Total</b>
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				
<b>Category #3: CORRECTIVE ACTION / CX ANALYTICS / SUPPORT STANDARD</b>				<b>Total</b>
The company seeks independent 3 <sup>rd</sup> 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				
<b>Category #4: INDEPENDENT 3<sup>RD</sup> PARTY VALIDATION – RECOGNITION / CUSTOMER BILL OF RIGHT</b>				<b>Total</b>
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				
<b>Category #5: PARTNERING 4 SUCCESS</b>				<b>Total</b>
				<b>Overall Category Totals</b>

**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:**

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

