

Relationship Assessment Tool

Criteria	0	1	2
Contact Surface (our end)			
Contact surface (their end)			
Number of services used			
Frequency of contact Tel/Email/F2F with project co-ordinators			
Frequency of contact Face-to-face with key decision makers			
Level of decision maker/ influence			
Sharing of plans/information on future projects			
Visits to us/ attendance at events (key decision makers)			
Invitations to <i>their</i> events			
Active competitors used			
Client feedback			

Implementation:

1. Use matrix to score the key account. Maximum score achievable is 22 (adjust maximum score if any specific criteria do not apply to this account)
2. Highlight the criteria where this key account has a low score and set action plans to improve the score within that criteria

Date:

Score:

Relationship Actions for Next Month: