Account Retention Tool

Account:				Date:	
Critical Retention Factor	**Rating***	**Improvement Action**		**Due Date**	**Accountable (RACI "A")**
1. The account's perspective on your delivery of real value					
2. The ease of communication and accessibility with the account					
3. Your coverage of the relationships in the account's buyer network					
4. Your high-level executive relationships with the account					
5. Your relevance in the account—the immersion of your business organization-wide					
6. The variety of products/ services from your offerings portfolio that you deliver to the account					
7. Your account wallet share—the proportion of eligible busiess you win versus competitors					
8. The current duration of your contract with the account					

*Ratings Scale:
1: Excellent
2: Exceeds Standards
3: Meets Standards

4: Below Standards
5: Poor
*To calculate the account retention average, add the ratings of the individual factors and divide the total by 16

Account Retention Tool

Sandler Training

Account:			Date:	
Critical Retention Factor	**Rating***	**Improvement Action**	**Due Date**	**Accountable (RACI "A")**
9. The status of current and forecasted pipeline opportunities with the account				
10. Your forecasted revenue growth in the account				
11. The profitability levels of your business with the account				
12. Your delivery performance with the account				
13. Your understanding of the account and its industry				
14. The account's satisfaction levels with your performance				
15. The status of the trust levels between the two organizations				
16. The account's level of dependence on your organization—your criticality to their mission				

*Ratings Scale:
1: Excellent
2: Exceeds Standards
3: Meets Standards
4: Below Standards
5: Poor
*To calculate the account retention average, add the ratings of the individual factors and divide the total by 16

TOTAL SCORE: _____

ACCOUNT RETENTION AVERAGE: _____

Sandler Enterprise Selling