

YOUR TOUCH POINT ADVANTAGE



ACCOUNT ROUNDING WORKSHEET

INDIVIDUALS INVOLVED IN PLANNING		TARGET DATES
Name: _____		Date Planning Started: _____
Name: _____		Date Plan Review: _____
Name: _____		Date Plan Completion: _____
Name: _____		Date Activity Starts: _____
Name: _____		Date Activity Completed: _____

WHICH CUSTOMERS ARE YOU TARGETING?

HOW WILL YOU IDENTIFY YOUR TARGET CUSTOMERS?

WHO IN THE AGENCY WILL BE INVOLVED - SUPPORT TEAM?

WHO IN THE AGENCY WILL BE INVOLVED - FRONT LINE CUSTOMER CONTACT?

WAYS TO MAKE IT SIMPLE & EFFICIENT:

HOW WE WILL TRACK & MEASURE RESULTS:

ACTION STEPS

ASSIGNMENTS
