ACCOUNT RELATIONS EXECUTIVE FOLLOW UP CHECKLIST

_____ Copy of contract to client

_____ Client database input

_____ Style of that city laminated sign placed in businesses designated area

_____ Thank you note sent or delivered to client within 3 days of contract date

_____ Client added to email blast list

_____ Ad info to office if Rep has not followed up (check with office first)

_____ Verification of ad approval with client or Rep

_____ Coupon stickers or flyers delivered (if applicable)

_____ Email blast once per week announcing new businesses and clients
(send email to office for approval prior to sending)

_____ Drop into clients twice monthly to see if they need anything. If Rep is visiting client once then schedule an intermittent visit

_____ Log sale on commission summary

Additional Account Relations Executive tasks: Prepare and make bank deposits, complete accounts payable and receivable ledgers. Purchase needed supplies. Create signs and promotional materials.

Check with Reps to see if they will be doing their own follow up. If so have the Rep sign and initial each item they have completed on the checklist sheet for that client. Complete any remaining items. File this checklist in client file.

I will be responsible for all items of follow up with my clients listed above. Please initial all items once completed.

_____ _____
Rep signature date

_____ _____
Account Relations Executive signature date