

Value Scorecard



Contact

Sales Pro

Name

Address

City, ST ZIP Email
Telephone

Sales Assistant Address

City, ST ZIP Email
Telephone

Supervisor Name Address

City, ST ZIP Email
Telephone

Other Key Partners Ad-
dress

City, ST ZIP Email
Telephone

Customer's name

TITLE COMPANY ADDRESS

Jan 15th, 2020. Suggested treasury management suite of products that is anticipated to save \$780 dollars annually.

April 10th, 2020.

Solved missing payment information and reposted funds to account. 1 day turn around.

May 5th, 2020. Emergency turn around on check orders.

June 15th, 2020. Renewed operating lines, increased line amount by \$200,000 to take advantage of rising inputs. Reviewed RMA spreads to share understanding of opportunities and strengths.

August 5th, 2020. Sales assistant recognized irregular activity on account. Agreed that it was incorrect. Solved issue and implemented positive pay solutions to prevent further issues.

October 18th, 2020. Met with executive team to talk about the trends in future steel prices and the potential for rising rates. Proactively approved an advancing term note for the purpose of taking advantage of timely equipment purchases.

Please let me know how I can continue to improve the value that I offer to you.

Take time to make note and scan back to meat xyz-company@companyemail.com

TWITTER

FACEBOOK

EMAIL

INSTAGRAM