









Business review for top 100 accounts will have major impact on retaining and growing top accounts. \_\_\_\_\_ is a full line distributor that can handle all of your Jan/San needs and more. We pride ourselves on getting to know what your needs are and helping drive your housekeeping program through training and standardization of product systems that fit your staffing needs. We will increase productivity of your staff by providing them with tools that will make them more efficient and help make your facility the cleanest environment possible. We offer solutions through a full evaluation of your current cleaning programs, procedures, equipment, and staff's responsibilities. No one is a born a good cleaning person, they are trained.

### **Financial Review**

1. past years purchases
2. current years purchases
3. number of invoices generated on a monthly basis
4. average size of each invoice
5. average fill rate to customer
6. number of invoices on today sure
7. average time to pay

### **Goal Sharing**

What is the customer trying to achieve?

Examples of this are.

1. cost savings
2. continuous improvement
3. vendor reduction
4. green initiative

Great questions to ask that will get the customer involved in the dialog.

What is the corporate goal of the company?

What is the goal of your department?

What is your individual goal?

### **Review complete cost savings project**

List the hard savings on products to the customer.

List the soft savings which are the added value. This list should include the in-service training, physical work that you have done for the customer. These savings should also include any program help or consultant help you have done for them.

If you lack achievement in this area this is a sure sign that you are not bringing value to this key account and you could be in jeopardy if the right salesperson or company get a chance to sell what they can offer.

### **Training and department interaction**

Let the customer know what you have been doing for them in their facility. (Don't be afraid to put too much in this area this is what brings the value added of you and your company to the customer)

This has a value and they know it. You need to put a dollar value on your time and services so that the customer sees the added value they are getting from

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### **Open Projects**

Identify where you are spending your time and the potential return of this account?

Be specific as you can about the estimated value of the proposed improvements.

### **New Customer Opportunities**

Briefly discuss the perceived value you can bring to the potential customer and the impact it may have for the customer.

This is an example of the introduction.

\_\_\_\_\_ has been around since \_\_\_\_\_ and we are experienced in getting to know what are customers needs are. We have been able to improve the performance of customers work staff without increasing their budget in many cases. What we would like to do is do a walkthrough of your facility and see what procedures and systems that you are currently using and see how we can improve the quality of cleaning through less labor intensive methods through the training your staff.

From this you set appointment or in some cases the manager will walk you through the facility at this point! This will give you the opportunity to see what systems they are using paper, liners, chemicals and equipment.

### **Project Management**

This is the final page that outlines your scheduled project updates.

The frequency of follow-ups may vary depending on the customers needs? The larger the account the more the frequency may be.

The frequency can vary from weekly, bi-weekly, monthly to quarterly based upon how much you need to do for the customer.

This is the time that you get commitment from the customer. The areas that you plan to help, time frames to be accomplished and schedules that you need arrange to help them and you reach their goals!

You want to make sure that you and the customers have a set time and day for the year set in both planners so you have time to discuss progress or lack of progress.

Effective sales people include-

What- the action to be taken.

By whom- sales person, managers, outside sources (factory reps or consultants)

By when- Date to be accomplished

Always document – what, when, and whom to be able to covered by you in you follow-up scheduled meetings.

# Customer Facility Survey

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Customer fact Finder

9/30/2009

Customer survey and questionnaire for building account presentation and programs.



## Accounts Survey Form

1. What are the most critical areas of focus in your facility?

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2. What method of cleaning do your people use to clean the most critical areas?

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3. What look do you expect out of your floor care program?

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4. What is your current floor program to achieve your results?

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5. How often do you burnish the floors to achieve facility results?

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6. What methods are being used to maintain your carpets?

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7. What type of training are your employees receiving from your Jan/San vendor?

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8. What paper and liners programs are being used?

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9. What equipment are you using to make your cleaning easier and more productive?

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10. What chemical dispensing units are you using to dispense your main core products?

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11. How often are you receiving deliveries to your facility?

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12. Do you have adequate storage for your supplies?

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13. What areas of training would you like to focus on to improve your desired look and productivity?

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14. What areas would you like to see your supplier help with the training of your staff?

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15. If you could change anything about your current programs what would you change?

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16. When making changes who beside yourself do you need to get involved in this decision?

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17. What day next week would you like us to meet with you to go over our findings and solutions?

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**Inventory Supply List Currently Using**

1. Liners:

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2. Paper:

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3. Chemicals:

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4. Pads:

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5. Equipment:

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6. Mops:

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7. Mats:

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8. Tools:

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Any comments to add to help with presentation to the customer on follow up visit.

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Submitted by \_\_\_\_\_

Date \_\_\_\_\_

# DEMOS SELL! PROMOTION

The following full scale carpet/floor demo's on **NSS equipment**.

<u>For Office Use</u>
Date Received: _____
<input type="checkbox"/> FSM Review: _____
<input type="checkbox"/> Cap Sent: _____
<input type="checkbox"/> Carbon Copy Territory: _____

Distributor Name: \_\_\_\_\_

Distributor Sales \_\_\_\_\_

Name of Account: \_\_\_\_\_

City: \_\_\_\_\_

Date Demo Done: \_\_\_\_\_

Demo Product:

Demo Area Size: (Minimum 200 sq. ft.)

Current Carpet or Finish program:

Number of Coats Applied:

Order Received:

If no order, why/when will a decision be made?

Results/Comments:

# Floor Systems: Training Program

## ***Floor Care Topics:***

**Dust Mopping Tools**

**Dust Mopping Procedure**

**Damp Mopping Tools**

**Damp Mopping Procedure**

**Auto Scrubbing Tools**

**This is the key in extending the life of a floor!**

**Auto Scrubbing Procedure**

**Daily Maintenance**

**Burnishing Tools**

**Rejuvenators / Restorers**

**High Speed Burnishing Procedure**

**Burnishing Review**

**Interim Maintenance**

**Deep Scrubbing Tools**

**Use All-Purpose cleaner to aide in removal of soil ,and damaged finish.**

**Deep Scrubbing Procedure**

**Interim Maintenance**

**Auto-Deep Scrubbing Tools**

**Auto-Deep Scrubbing Procedure**

**Deep Scrubbing Review**

**Restorative Maintenance**

**Floor Stripping Safety**

**Floor Stripping Tools**

**Proper Stripper for the job**

**Floor Stripping Procedure**

**Floor Stripping Review**

**Floor Finishing**

**Floor Finishing Tools**

**Floor Finishing Procedure**