	<h1 style="text-align: center;">Account Management</h1> <h2 style="text-align: center;">Policies and Procedures</h2>	Document Number: 2P-SAL-12.06
	Department: Sales	Effective Date: September 5, 2025
		Revision No 4

Scope

Start with regular visitation, building relationship, discussion of KPI, and ends with written report based on the discussion.

Objective

- To be able to manage the account by building fruitful relationship through managing customer expectation in efficient and consistent manner
- To identify opportunities and improve performance through business review/ meetings in achieving the service level agreement

Definition/s:

- SLA – Service level of agreement an official commitment that prevails between service provider and the customer.
- CRM (Customer Relation Management) – is a business tool that allows sales personnel to manage information of customers, partners, workflow processes, communication, productivity, sales activities such as report and itineraries.

Policies

1. To conduct monthly representation, business review/ meetings, wine & dine, at least (5) five accounts per month per Sales Person.


References/ Source (Any of the following):

- CRM
- Minutes of the Meeting (MOM)

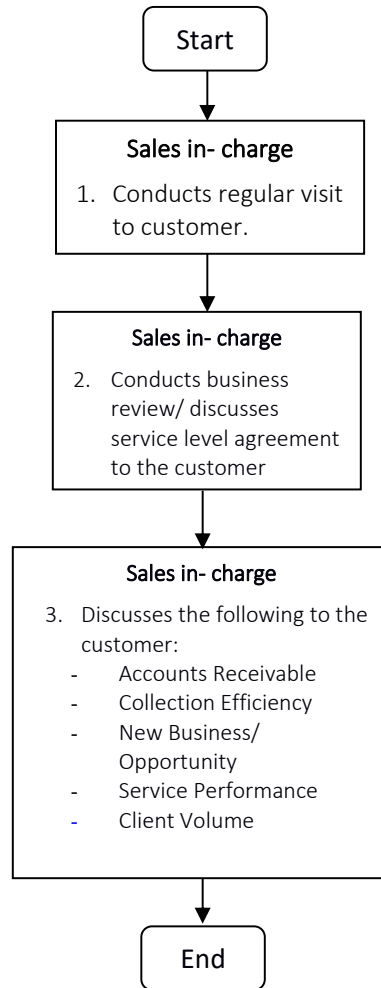
DDC: This Document is already Approved and Posted on Intranet.

Please refer to printed files for signatures of approvers.

Any printed and saved copy of this document is considered uncontrolled

	<h1>Account Management</h1> <h2>Policies and Procedures</h2>	Document Number: 2P-SAL-12.06
	Department: Sales	Effective Date: September 5, 2025 Revision No 4

Procedures



DDC: This Document is already Approved and Posted on Intranet.

Please refer to printed files for signatures of approvers.

Any printed and saved copy of this document is considered uncontrolled