

Account Management Best Practices

Best Practice: 90 days before your client's renewal date, send a coffee for the week to perk them up and strengthen your relationship!



INTRODUCING YOURSELF

Send a 'berry' nice treat to introduce yourself as the Account Manager! It is 'berry' great to meet you! Looking forward to connecting on our kick-off call.



RENEWAL

Celebrate your client's renewal with a **charcuterie bundle!**

We appreciate you renewing your contract with us! Excited to continue growing together.



Treat a client to some **munchies** to help them stay fueled up and focused for your meeting.

Looking forward to our meeting today. Enjoy lunch on me!



RE-ENGAGING WITH AN INACTIVE CLIENT

Re-engage an unresponsive client with a 'let's taco soon' lunch. Wishing you a wonderful week ahead and hope to 'taco' soon!



CLIENT ENGAGEMENT

Show appreciation all year with gestures like a **movie night at home** so renewals are a no brainer for your client.

Thank you so much for your partnership! Take some time for yourself to recharge this week!

ADDITIONAL TOUCHPOINTS

AFTER A KICK OFF CALL

Once the kick off call is complete, send a **congrats cappuccino** to celebrate your new relationship.

We are super excited to work with your team! Enjoy a caffeine boost on us!

SUCCESSFUL CAMPAIGN

Celebrate a successful campaign or initiative launched with a box of cookies.

Congratulations on the successful launch of your campaign! It is such a pleasure to work together and we cannot be more thrilled about our partnership.

ASSISTING A CLIENT

Send a treat to say **thnks for your 'loyaltea'** after helping a client. We greatly appreciate your business and look forward to a long-lasting partnership.

MISUNDERSTANDINGS OR ERRORS

Mistakes happen so acknowledge the misunderstanding or error and strengthen your relationship with an 'eggstra' sorry sandwich.

Thank you for your patience and understanding.