

RELATIONSHIP MANAGEMENT PLAN

COMPANY / INDIVIDUAL NAME
STREET ADDRESS
CITY, STATE ZIP CODE

DATE

TABLE OF CONTENTS

INTRODUCTION 2
CUSTOMER BACKGROUND AND DESCRIPTION 2
SPECIFIC CUSTOMER NEEDS 2
ADDITIONAL CUSTOMER OPPORTUNITIES 2
RELATIONSHIP STRATEGY 2
COMMUNICATION PLAN 2
VALUE PROPOSITION 3
APPROVALS 4

INTRODUCTION

Customer Relationship Management (CRM) is an imperative business function which forms and develops a mutually beneficial relationship between a provider and a client. The significance of CRM has grown from simple customer service to an integrated solution which establishes a level of trust in forming long term relationships and identifying additional business opportunities.

CUSTOMER BACKGROUND AND DESCRIPTION

This section describes the customer organization and may include details regarding the customer's history, leadership, organizational structure/environment, industry, and performance. The more detail that is provided, the better the plan will illustrate ways in which the relationship can be effectively managed.

SPECIFIC CUSTOMER NEEDS

This section describes the specific needs that the customer has. These may be needs that are currently being addressed in the business relationship or needs that have been identified that can be developed into new opportunities. Many times a client will plainly state what their needs are to see if their vendor is able to help them. This section should not be confused with the identification of other potential opportunities.

ADDITIONAL CUSTOMER OPPORTUNITIES

Many times, through the course of normal work between organizations, other potential opportunities may be identified which have not specifically been brought up by the customer. This section provides a description of these opportunities, any discussions that have taken place regarding these opportunities, and how the organization may be able to help the customer. This section may also provide a list or description of next steps in pursuing these potential opportunities. There may also be occasions where the potential opportunity comes with significant risk or is not pursued for another reason.

RELATIONSHIP STRATEGY

This section describes the strategy for how the organization will strengthen and maintain the business relationship with its customer. This may include descriptions of the health of the current relationship, courses of action to grow the relationship, any opportunities for partnering, descriptions of any conflict in the relationship, and any individuals or groups which must be part of this effort.

COMMUNICATION PLAN

This section should describe how the company will maintain communications with the customer. This may include methods of communication, frequency, who will communicate, what information will be communicated, and the purpose of the communications. Effective communication is an important part of building and maintaining healthy business relationships

with customers. They must understand that their needs are important to us as well as understand the ways we can help them which they may not already be aware of.

Financial Instituion Communication Points of Contact:

Name	Title	Email	Phone Number
J. Doe	President and COO	j.doe@dcg.com	(999) 555-1110
D. White	Executive VP	d.white@dcg.com	(999) 555-1111
M. Black	Marketing Manager	m.black@dcg.com	(999) 555-1113
S. Green	Marketing Capture Manager	s.green@dcg.com	(999) 555-1122
A. Thomas	Sales Manager	a.thomas@dcg.com	(999) 555-1133

Company Communication Points of Contact:

Name	Title	Email	Phone Number
R. Jones	CEO	r.jones@abc.com	(999) 123-1212
D. Johnson	President of Operations	d.johnson@abc.com	(999) 123-2121
B. Franklin	President of R&D	b.franklin@abc.com	(999) 123-5151
E. Smith	Contracts Manager	e.smith@abc.com	(999) 123-3131
L. Davis	Procurement Manager	l.davis@abc.com	(999) 123-4141

VALUE PROPOSITION

This section should describe the how your company adds value to the customer. It should address what your company offers that others do not or why your performance is more valuable than a competitor’s. Customer satisfaction, unique products or services, or tailored solutions are common ways a company can establish value. Value propositions are used to set your company apart from its competition. The tenets of the company’s value proposition should be the basis of communication between your organization and existing or potential customers.

APPROVALS

The Relationship Management Plan may or may not require executive approval depending on the organization. Although it is an extremely valuable tool, it is not a formal part of project management methodology or framework.

The signatures of those below indicate an understanding in the purpose and content of this document by those signing it. By signing this document you indicate that you approve of the proposed Relationship Management Plan.

Approver Name	Title	Signature	Date
Doe, J.	President and COO		
White, D.	Executive VP		