

The Account Confidence Scorecard

Use these on actual accounts, not hypothetically. Pull up a specific account before you open any of the four pages that follow — the value is in what they surface about that account, not in reading them cover to cover.

The signals that tell you an account is ready to grow — before you pitch anything.

ADDITIONAL NOTES

ACCOUNT WORKSHEET

Five-Area Account Review

One page. One real account. Where it actually stands, area by area.

WHAT

A one-page maturity check across five areas of account health — Foundation, Visibility, Alignment, Growth, and Partnership.

WHY

It's a fast way to see where an account actually stands, instead of assuming it's fine because nothing is currently on fire.

WHEN

Quarterly, at renewal, or whenever something about an account feels off and you can't quite name what.

HOW

For each area, read the description and mark where you honestly are: Initial, Defined, or Optimized. Then answer the follow-up question in your own words — don't skip it, that's where the real information is. When you're done, find your weakest area. That's what to focus on next, not the account's overall average.

ACCOUNT: _____

DATE: _____

INITIAL — inconsistent or person-dependent

DEFINED — understood and repeatable

OPTIMIZED — measured, intentional, and continuously improved

01 FOUNDATION

Delivery is stable and trusted — Service Level Agreements (SLAs) are met and there are no active fires.

☐ INITIAL

☐ DEFINED

☐ OPTIMIZED

What's the evidence, one way or the other?

02 VISIBILITY

You know what success actually looks like to them, beyond the contract.

☐ INITIAL

☐ DEFINED

☐ OPTIMIZED

When did you last confirm it, in their words?

03 ALIGNMENT

Sales, Delivery, Finance, and the customer are all seeing the same account.

☐ INITIAL

☐ DEFINED

☐ OPTIMIZED

Where would those views disagree right now?

04 GROWTH

You've identified and pursued expansion opportunities on this account.

☐ INITIAL

☐ DEFINED

☐ OPTIMIZED

What's the most recent one, and what happened to it?

05 PARTNERSHIP

You're treated as a strategic partner — consulted before decisions, not after.

☐ INITIAL

☐ DEFINED

☐ OPTIMIZED

What's the evidence they'd call you a partner, not a vendor?

Your weakest area tells you what to fix next — not how good the account is overall.

THE ONE THING THIS ACCOUNT NEEDS NEXT

NEXT ACTION

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CUSTOMER REFERENCE

10 Questions to Ask Your Customers

Straight from the framework. Bring these into your next real conversation.

WHAT

Ten open-ended questions drawn from the framework, built to get past status-update small talk.

WHY

Most customer conversations only surface what you already know. These are built to surface what you don't.

WHEN

Before a Quarterly Business Review (QBR), a check-in, or any conversation where you'll have real, uninterrupted time with the customer.

HOW

Don't ask all ten in one sitting — pick two or three that fit the conversation. Ask the question, then stay quiet and let them answer fully before you respond. Write down what they actually said, in their words, in the space provided.

ACCOUNT: _____ **DATE:** _____

01 “If this engagement were wildly successful, what would that look like to you a year from now?”

DEVELOPS: ☐ Business ☐ Internal ☒ **Customer** ☐ Learning

02 “What would you tell your boss is working well right now, if they asked you today?”

DEVELOPS: ☐ Business ☐ Internal ☒ **Customer** ☐ Learning

03 “What are you trying to get done in the next two quarters that you haven't started yet?”

DEVELOPS: ☐ Business ☐ Internal ☒ **Customer** ☐ Learning

04 “Where do you think we don't fully understand your business?”

DEVELOPS: ☒ **Business** ☐ Internal ☐ Customer ☐ Learning

05 “Who else in your organization should we be talking to that we currently aren't?”

DEVELOPS: ☐ Business ☒ **Internal** ☐ Customer ☐ Learning

06 “If you could change one thing about how we work together, what would it be?”

DEVELOPS: ☐ Business ☐ Internal ☒ **Customer** ☐ Learning

07 “What's the thing you're most worried about right now, even if it's not about us?”

DEVELOPS: ☐ Business ☐ Internal ☒ **Customer** ☐ Learning

08 “How does what we do for you get reported up to your leadership?”

DEVELOPS: ☐ Business ☐ Internal ☐ Customer ☒ **Learning**

09 “Is there a workaround your team has built because we don't do something you need?”

DEVELOPS: ☐ Business ☒ **Internal** ☐ Customer ☐ Learning

10 “On a scale that matters to you, how confident are you in where this is headed?”

DEVELOPS: ☐ Business ☐ Internal ☒ **Customer** ☐ Learning

You don't need all ten in one sitting. Two or three, asked well, beat ten asked as a checklist.

NEXT ACTION

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RISK REFERENCE

Early-Warning Signals Checklist

What to watch for before an account is already at risk of churn.

WHAT

Sixteen observable signals across four categories — Communication, Relationship, Delivery, Commercial — that tend to show up before an account is at real risk.

WHY

By the time an account is visibly struggling, you've usually lost weeks of runway to fix it. This surfaces the quieter signals first.

WHEN

On any account where something feels slightly off, or on a standing schedule (monthly or quarterly) across your book of business.

HOW

Go category by category and check anything that's true right now — not anything that could theoretically happen. Three or more checks in a single category is your signal to act this week, not at the next scheduled review.

ACCOUNT: _____

DATE: _____

COMMUNICATION SIGNALS

- ☐ Response times from your contact have noticeably slowed.
- ☐ Meetings are getting cancelled, shortened, or delegated down.
- ☐ You're hearing about problems secondhand instead of directly.
- ☐ Your contact has stopped asking questions in reviews.

RELATIONSHIP SIGNALS

- ☐ Your primary contact has gone quiet or changed roles.
- ☐ You haven't met their leadership in over six months.
- ☐ They've stopped looping you into their own planning.
- ☐ A workaround has appeared that doesn't involve you at all.

DELIVERY SIGNALS

- ☐ Service Level Agreements (SLAs) are technically met, but satisfaction is visibly dropping.
- ☐ Recurring issues keep surfacing that “aren't quite” escalations.
- ☐ A rise in ad hoc requests that sit outside the contract.
- ☐ Scope has crept, with no conversation about it either way.

COMMERCIAL SIGNALS

- ☐ The renewal conversation keeps getting pushed.
- ☐ Budget conversations are happening without you.
- ☐ A competitor's name has come up, even casually.
- ☐ Invoice disputes or slower payment are starting to appear.

Three or more checked in a single category is worth acting on this week — not at the next scheduled review.

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ADDITIONAL NOTES

GROWTH REFERENCE

Expansion Opportunity Checklist

The signals that tell you an account is ready to grow — before you pitch anything.

WHAT

Sixteen signals across four categories — Demand, Relationship, Business, Timing — that indicate an account may be ready to grow.

WHY

Expansion conversations land better when they're based on real signals the customer has already shown you, not a quota you need to hit.

WHEN

When you're reviewing an account for growth potential, or before requesting a Growth/Expansion Conversation with the customer.

HOW

Check anything that's actually happened — not anything you're hoping will happen. Three or more checks in a category means the conversation is worth having. Bring your evidence, not a pitch.

ACCOUNT: _____

DATE: _____

DEMAND SIGNALS

- ☐ They've mentioned a new initiative more than once.
- ☐ A workaround exists that a broader service could replace.
- ☐ They've directly asked what else you offer.
- ☐ Headcount or budget is visibly growing on their side.

RELATIONSHIP SIGNALS

- ☐ You're being included earlier in their planning.
- ☐ They've introduced you to new stakeholders unprompted.
- ☐ They defend you internally without being asked to.
- ☐ Renewal conversations feel easy, not defensive.

BUSINESS SIGNALS

- ☐ Their business is growing — new locations, products, or M&A.
- ☐ They've mentioned new compliance or regulatory pressure.
- ☐ A leadership change on their side could reopen the roadmap.
- ☐ A specific initiative has a deadline attached to it now.

TIMING SIGNALS

- ☐ Their next budget cycle is coming up in the near term.
- ☐ The contract is nearing renewal with real headroom in it.
- ☐ Fiscal year planning is visibly underway on their side.
- ☐ They've asked what a bigger commitment would look like.

Three or more checked in a single category is worth your Growth/Expansion Conversation — not a cold pitch.

NEXT ACTION

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ADDITIONAL NOTES

Put this to work? I'd love to hear what it surfaced.
Send your feedback to bob.roark@bobroark.com