



## KEY Account Worksheet

Read Chapters 14–15 in *Quit Whining and Start SELLING!* for insights into the value of KEY accounts and how you can use them to identify your best prospects.

### What you need:

- A sales revenue report – by customer, ranked from highest to lowest (typically, from the past 12 months)
- If you want to compare to the previous year, obtain a similar report for the prior year
- A calculator

### Steps:

1. Find your current total Sales Revenue (past 12 months).
2. Multiply by 80%.
3. Add up the revenue of each customer on your report (from the top, beginning with your best customer) until you reach the 80% number from No. 2 above. Draw a line under that account. How many customers is that?
4. Now, count the total number of customers on your report.
5. Multiply by 20%. How close is this number to the number of accounts it took to get to 80% of your revenue??

The customers that represent (approximately) 80% of your sales revenue are called **KEY Accounts**. They will vary from year to year as your sales revenue and customer make-up change over time. These accounts should become the core of your sales strategy – you need to protect them, grow them, and find more customers like them!

	Current	Previous Year
Current Total Sales Revenue	\$	\$
Current Number of Accounts (Actual Ordering Customers)		
Number of Accounts to Reach 80% of Total Revenue		
Average per KEY Account	\$	\$
Threshold to Reach KEY Account Level (Sales revenue of smallest KEY Account)	\$	\$