






MarketingWorks

CLIENT HEALTH DASHBOARD WORKSHEET

The purpose of this worksheet is to capture responses from your leadership team to track client health and satisfaction to ensure alignment with the company goals.

This exercise should ideally be completed once a month. Results should be compared month-to-month to monitor relationship improvements, declines, etc.

CLIENT/COMPANY NAME				RATING EXPLANATION	NEXT STEPS	CLIENT "OWNER"



= Client is satisfied – No immediate action required.



= There is a sense of concern – Determine reasons & follow up.



= Dissatisfied & in danger of losing client – Immediate action is required.

**To make the process more automated, you can also create a customized, online dashboard via <https://docs.google.com/forms/u/0/>*