Account Management Team Survey

Vendor

Account Management Team Survey – Vendor

For Reporting Period: FY ___ Quarter : _____
Completed by: SBO Vendor Management Team

The Vendor Management Team of the Statewide Benefits Office is using this tool to evaluate the Account Management Team of Vendor in serving as a provider of (describe) services to the employees (and pensioners) of the State of Delaware.

Knowledge: Indicate the extent to which you agree that your Account Management Team:

	Strongly Agree 5	Agree 4	Somewhat Agree 3	Disagree 2	Strongly Disagree 1	For any "1" or "2" responses, please provide specific comments in the area below
1. Understands your benefits plan.	❒	❒	❒	❒	❒	_____
2. Understands your business needs. Meets with you to establish needs and service expectations.	❒	❒	❒	❒	❒	_____
3. Understands your service expectations. Develops a business plan that incorporates the agreed upon needs and expectations.	❒	❒	❒	❒	❒	_____
4. Displays knowledge regarding (describe) benefit products and services.	❒	❒	❒	❒	❒	_____
5. Clearly explains your report results.	❒	❒	❒	❒	❒	_____

Average Rating _____

Professionalism: Indicate the extent to which you agree that your Account Management Team:

	Strongly Agree 5	Agree 4	Somewhat Agree 3	Disagree 2	Strongly Disagree 1	For any "1" or "2" responses, please provide specific comments in the area below
6. Actively listens to and acknowledges your issues and concerns.	❒	❒	❒	❒	❒	_____
7. Provides appropriate verbal communication.	❒	❒	❒	❒	❒	_____
8. Provides appropriate written communication.	❒	❒	❒	❒	❒	_____
9. Works with you to develop a positive working relationship.	❒	❒	❒	❒	❒	_____

Average Rating _____

Proactive Management: Indicate the extent to which you agree that your Account Management Team:

	Strongly Agree 5	Agree 4	Somewhat Agree 3	Disagree 2	Strongly Disagree 1	For any "1" or "2" responses, please provide specific comments in the area below
10. Actively monitors your account and interacts with you in a frequency that meets your needs.	❒	❒	❒	❒	❒	_____
11. Communicates potential problems/issues.	❒	❒	❒	❒	❒	_____
12. Provides viable alternative solutions that meet your business needs.	❒	❒	❒	❒	❒	_____
13. Manages and understands system requirements and their effect on your business.	❒	❒	❒	❒	❒	_____
14. Sets realistic expectations regarding turn-around time.	❒	❒	❒	❒	❒	

Average Rating _____

Accessibility: Indicate the extent to which you agree that your Account Management Team:

	Strongly Agree 5	Agree 4	Somewhat Agree 3	Disagree 2	Strongly Disagree 1	For any "1" or "2" responses, please provide specific comments in the area below
15. Available to you on a timely basis.	❐	❐	❐	❐	❐	_____
16. Allocates appropriate time when meeting with you.	❐	❐	❐	❐	❐	_____
17. Demonstrates flexibility with regard to schedule changes.	❐	❐	❐	❐	❐	_____
18. Provides/communicates alternate contacts in the event of their absence.	❐	❐	❐	❐	❐	_____
19. Advises you of schedule limitations upon contact for meetings, conference calls, projects etc.	❐	❐	❐	❐	❐	_____

Average Rating _____

Responsiveness: Indicate the extent to which you agree that your Account Management Team:

	Strongly Agree 5	Agree 4	Somewhat Agree 3	Disagree 2	Strongly Disagree 1	For any "1" or "2" responses, please provide specific comments in the area below
20. Responds to your inquiries in a timely manner.	❐	❐	❐	❐	❐	_____
21. Provides thorough responses to your inquiries.	❐	❐	❐	❐	❐	_____
22. Follows-through regarding outstanding problems/issues/items.	❐	❐	❐	❐	❐	_____
23. Solicits the assistance of product experts when needed.	❐	❐	❐	❐	❐	_____

Average Rating _____

Overall Average Rating _____

Please include any other comments or suggested action steps: