

Commercial Account Review

Start with your five most important commercial, fleet, municipal or farm accounts. Write a short snapshot of each, then look at what the account really earns.

1 Account snapshot

Account	Relationship owner
Last spoke to them	Account type
☐ Landscaper	☐ Property manager
☐ Municipal / school	☐ Farm / ranch
☐ Fleet	☐ Other

2 What they run

By serial number, so service history follows the machine.

UNIT AND MODEL	SERIAL	AGE / HOURS	LAST SERVICE	REPLACE SOON?

3 The account questions

QUESTION	THEIR ANSWER
How is this equipment used, and how hard?	
What happens to your business if a machine goes down?	
Who approves purchases, and what paperwork do they need?	
How do you handle maintenance now?	
Replacing one unit, or planning a change across the fleet?	

4 Written terms on file

☐ Pricing or discount agreed, and when it was last reviewed	☐ Purchase order requirements
☐ Tax status documented	☐ Payment terms
☐ Priority rules the shop and customer both understand	☐ Open quote or replacement coming up

5 What the account really earns

An account that looks large on the sales report can look very different once these are answered.

QUESTION	ANSWER	NOTES
Is the account growing, steady or slowing?		
Are repairs mostly planned, or mostly urgent?		
Do they pay to terms?		
Discounts given this year, and were they decided on purpose?		
Margin left after discounts, rework and rush work		
Shop capacity it uses in the busy season		
Parts and service through the year		

6 What the counter sees, and what the owner sees

ITEM	SEEN
A discount request is also a precedent for the next deal	☐
Needing it first is also a question of capacity and fairness to everyone else in line	☐
Easy paperwork for a municipal buyer can mean a renewal every year	☐
Replacing one mower can be the start of a fleet standard	☐
A big account that pays slowly is cash the business is lending out	☐

7 Your five accounts

ACCOUNT	OWNER	SNAPSHOT DONE	WHAT IT TURNED UP

A commercial account is valuable when the relationship is repeatable, supportable, profitable, and worth the capacity it consumes.

WANT A SECOND SET OF EYES?

Start a conversation at profitedgesystems.com about pricing and managing commercial accounts.