

Business Client Relationship Review Template

This template is designed to review and assess the ongoing relationship with a business client. Fill out the fields below for record-keeping and printing.

1. General Information

Client Company Name:

Date of Review:

Review Conducted By:

Relationship Manager:

Relationship Start Date:

2. Relationship Status & Health

Rate or comment on the following aspects of the relationship (e.g., Excellent, Good, Fair, Poor):

Overall Client Satisfaction:

Communication Quality and Frequency:

Service/Product Delivery Quality:

Level of Mutual Trust:

3. Achievements & Successes

List key milestones, successful projects, or value delivered to the client during this review period:

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4. Challenges, Pain Points, & Risks

Identify any friction points, service failures, or risks of client churn:

- Key Issue 1:
- Key Issue 2:
- Current Risk Level (Low / Medium / High):

5. Growth & Expansion Opportunities

Outline potential areas for upselling, cross-selling, or deeper collaboration:

Opportunity 1:

Opportunity 2:

6. Action Plan & Next Steps

Action Item	Responsible Owner	Target Completion Date
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

7. Client Feedback & Meeting Notes

Record direct feedback or notes from the relationship review meeting:

8. Sign-off & Signatures

Relationship Manager Signature: Date:

Client Representative Signature: Date: