

Five freight accounts worth reviewing

A short working sheet for commercial leaders. Use it with the account owners before the next customer review.

1. Choose five accounts

Select relationships where losing a route, shipment volume or the whole account would matter. Include accounts that look healthy but have limited recent customer evidence.

2. Check the evidence

For each account, write down the last customer conversation that established the points below. Mark unknown when you do not have direct evidence.

- Who influences renewal or allocation of freight, and who experiences the service daily?
- What matters most to those contacts, and what service outcome do they expect?
- Where has their experience fallen short, including repeat friction that never became a formal complaint?
- Has the client confirmed that the last corrective action improved the experience?
- Have their routes, volumes or service needs changed, creating a relevant expansion discussion?

This is a conversation aid, not a validated churn score. An unknown answer indicates a gap in your evidence, not proof that the customer is dissatisfied.

The next customer conversation

Complete one line per account. Use the underlying customer evidence to choose what needs attention first.

Account / owner	Evidence gap or concern	Next action / date
1.		
2.		
3.		
4.		
5.		

Commercial context

Where available, record annual account revenue and gross profit separately. Check whether lower shipment volume reflects changing demand, pricing, seasonality or a relationship issue before attributing a cause.

Cliezen can help structure this review with customer feedback and accountable follow-through. To explore one account together: kari@cliezen.com