

## KEY ACCOUNT REVIEW REPORT

CLIENT: Allsopp@Birmingham Road

DATE: 12.09.17

REVIEWING MANAGER: James Cameron

LOCATION: Allsopp@Birmingham Road

ATTENDEES: Rebecca Docherty

BUSINESS KPI REPORT	PY	CY	% CHANGE (+/-)
Applications created	171	214	25
Applications accepted	136	161	18
Applications paid out	121	151	25
Acceptance rate (%)	79.53	75.23	-5
IFC transactions	170	211	24
IFC ratio (%)	99.42	98.60	-1
IBC transactions	1	3	200
IBC ratio (%)	0.58	1.40	140
BNPL transaction	0	0	0
BNPL ratio (%)	0.00	0.00	0
Applications paid out (£)	£259,676.00	£369,699.00	42
Average paid out value (£)	£2,146.08	£2,448.34	14
In practice applications	129	64	-50
In practice ratio (%)	75.44	29.91	-60
Remote applications	42	150	257
Remote ratio (%)	24.56	70.09	185
Cancellations	1	6	500
Complaints (refer to HO)	0	0	0

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PRACTICE CONTACTS		
<b>Users and log-in details</b>		
Completed on last account review		
<b>Training requirements</b>		
No Training required however practice aware of training support available if this should change.		
RESOURCE CENTRE		
<b>Calculator specification</b>		
600 Ultra		
<b>Legal entity details</b>		
As completed on account review		
<b>POS items</b>		
None required		
WEBSITE		
New one under construction.		
MEMBERSHIP PLANS		
Plan provider	Patient numbers	£ Administration fee
BDM ACTIONS		DATE COMPLETED
Send through advertising guidelines. Check new website once finance page is constructed. Ensure practice receives figures for Gabriel report.		
PRACTICE ACTIONS		DATE COMPLETED
Send through new website screen for finance.		
NEXT REVIEW DATE		10.01.18

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VOC FEEDBACK	
On a scale of 0 – 10 with 0 being 'terrible' and 10 being 'terrific' how would you rate the Medenta resource centre?	10
On a scale of 0 – 10 with 0 being 'terrible' and 10 being 'terrific' how would you rate the Medenta / Hitachi Creditmaster2 portal?	10
On a scale of 0 – 10 with 0 being 'terrible' and 10 being 'terrific' how would you rate the support you get from the Medenta office team?	10
On a scale of 0 – 10 with 0 being 'terrible' and 10 being 'terrific' how would you rate the reports and management information you get from Medenta and Hitachi?	10
On a scale of 0 – 10 with 0 being 'not at all' and 10 being 'definitely' how likely are you to recommend Medenta to professional colleagues?	10
If you could change one thing about the Medenta Resource Centre, what would it be?	Nothing
If you could change one thing about the Medenta/Hitachi portal, what would it be?	Make E-sign clearer.
If you could change one thing about the way we work together, what would it be?	Nothing already a life changing experience.
GENERAL NOTES	
<p>Gabriel reporting period ends in August and is due for completion by October.            New website is under construction.            Marketing campaign will be launched in November of this year, so we can assess figures in January review.</p>	