

# Terms of Reference: Account Management Meetings

Logistics	
Frequency	Quarterly/Bi-annually
Format	F2F, CC
Location	Alternate/CC
Duration	Up to 2 hours

Attendees	
Business Stream	Wholesaler
Wholesale Account Manager	Retail Account Manager
Head of Wholesale Management (optional)	Others as required
Others as required	

Objectives
<ul style="list-style-type: none"> <li>Review of retailer and wholesaler performance</li> <li>Identification of performance issues for action/resolution</li> <li>Resolution of escalated operational issues</li> <li>Risk outlook and planning – drought risk/plans, customer etc.</li> <li>Review of financial matters (settlement/disputes)</li> <li>Mutual sharing of relevant organisational and team changes and developments (e.g. staff, projects, policy, systems development)</li> <li>To identify, review and implement opportunities for improvement</li> <li>Resolution of assigned actions</li> </ul>

Inputs	
BS	Action tracker
BS/WS	Performance reports
BS/WS	Escalated issues / opportunities / themes
BS/WS	Business updates (e.g. changes, initiatives, corporate)

Agenda		
1	10 min	Actions update
2	50 min	Performance reporting, review and discussion: <ul style="list-style-type: none"> <li>Operational</li> <li>Communications and processes</li> <li>Contractual</li> <li>Financial/settlement</li> </ul>
3	20 min	Issues and opportunities: <ul style="list-style-type: none"> <li>Risk outlook and planning</li> <li>Others as required</li> </ul>
4	20 min	Business and market updates
5	10 min	A.O.B.
6	10 min	Actions recap and DONM

Outputs	
BS	Updated action tracker
BS/WS	Updates on escalated issues/opportunities
BS/WS	Information and actions to cascade