

CEA Account Lists

Purpose: A singular document to hold vital information about each account a CEA works with. This document will not only help the CEA but will assist others if they are providing coverage for you.

Expectations:

- CEAs are to keep their account list document up to date at all times and update the list whenever information about an account changes.
- The information in the account list is kept in addition to client wiki pages (covered in another module).
- Initial document creation will be handled by a CEA trainer.
- Each rep partnered with a CEA has a separate tab within the document.

Example account list:

A	B	C	D	E	F	G	H
Account Number	Account Name	Contact Name	Contact Phone Number	Contact Email	Preferred Method of Communication	Ad Copy Procedure	Notes
377345	Academy Vacuums	Justin	716-877-5616 (c) 716-471-6900	justin_finocchi@yahoo.com ; academyvac@ymail.com	??	same as	
394242	Addy's Fine Wine And Spirits	Louis	716-810-9495 (c) 716-570-9153	addyswine@gmail.com	Text	same as	
551702	Aloha Krab Buffalo	Fan	716-681-1222 (c) 914-217-6199	alohakrabbuffalo@gmail.com	Text	same as	
369415	Amherst Buffet	Jeff	716-835-9898 (c) 917-620-1243	Jeffchen1960@yahoo.com	Text or Call	same as	
313584	Ax Men Tree	John	(c) 716-998-8780	axmentreeservice@yahoo.com	Text	same as	
386075	Blount Construction Co	James & Mackenzie	716-876-7262 (c) 716-628-2501	blountconstructionco@gmail.com	Text	same as	
554257	Bocce Club Pizza	Mark (Proofs) Jim (IOs)	(c) 716-983-3776 (M) (c) 716-583-2782 (J)	(M) BoccePizza@gmail.com (J) BoccePie@aol.com	Email (Mark)	same as	
278628	Braendel Painting And Services Inc	Jeff	716-845-5544	jeffcatrabone@gmail.com	Email & Call	same as	
551823	Buffalo Cabinet And Countertop Resurfacing	Scott	716-710-2224	huntingtongc@yahoo.com	Email & Call	same as	
513361	Buffalo Concrete Coatings	Kiersten & Jason	(c) 716-207-0977 (K) (c) 716-983-4692 (J)	jasongadd@yahoo.com	Text (K)	same as	
555276	Buffalo General Dentistry	Dan	716-836-1620 (c) 716-807-4858	daniel.jammal@gmail.com	Email, Call & Text	Email for copy.	
279178	Buffalo Trim Men's Haircuts	Nick	716-636-2200	NickKelly87@gmail.com	Email	same as	