

RELATIONSHIP BUILDING CALENDAR

Strategic Partnership Management
Fiscal Year: _____ / Quarter: _____

FOCUS AREA	ENGAGEMENT ACTIVITY	FREQUENCY	STATUS TRACKING
Core Clients	Quarterly Business Review (QBR) & Strategic Alignment	Quarterly	
Stakeholders	Personalized Value Delivery / Industry Insight Reports	Monthly	
Prospecting	Networking Event Attendance & Direct Outreach	Weekly	
Appreciation	Client Anniversary, Holiday, or Milestone Gifting	Annually	
Social Capital	Casual Coffee / Informal Touchpoint	Bi-Monthly	

STRATEGIC NOTES & FOLLOW-UPS