



Account Management

...retain key accounts

Retaining and developing existing business is becoming increasingly difficult as competition increases and loyalty declines. This is an interactive workshop where you will produce real draft plans that will help you identify and build more profitable accounts. Each session will take you through successive stages in the key account management process. The trainer will provide input to explain tools and techniques and you will then apply these to your own account to put together draft plans.

Content

- Key account management essentials
- Key account management process – overview
- Account diagnosis
- Client mapping
- Opportunity assessment
- Objective setting and planning
- Networking
- Influencing and engaging customers
- Following through, practical account planning session

"An excellent course that provided a lot of techniques and ideas to take back to the workplace. It will help me develop in my role and ensure the business benefits as well. Excellent trainer giving examples and tools to aid my understanding."

Lisa Wookey
**Business Relationship
Manager**



Features

- 7 stage account management process
- Comprehensive client mapping methodology
- Tips on client mapping
- Customer perception ladder
- Networking planning tool
- Extensive practical application of techniques

Duration: Two day course





Account Management

Day One

1. Key account management essentials

- Why manage key accounts?
- Hunting v farming
- Key account management as a participative process

2. Key account management process - overview

- Account diagnosis
- Client mapping
- Opportunity assessment
- Objective setting and planning
- Networking
- Influencing and engaging
- Following through

3. Account diagnosis

- Customer experience model
- Customer promise
- Perceived quality during service
- Proof of service
- Customer perception ladder
- Key account management actions

4. Client mapping

- Understanding different clients
- Tools for client mapping
- Client checklist
- Real work on current relationships

5. Opportunity assessment

- Understanding the client business
- Contributing to the client's competitive advantage
- Value disciplines
- Key customer value analysis
- Matching services to needs

Day Two

6. Objective setting and planning

- What specifically do you want to achieve?
- Relationship goals?
- Business development goals?
- Quality goals?
- Communication goals?

7. Networking

- Networking within your organisation
- Networking with clients
- Benefits of networking
- Contact value analysis
- Action planning to improve networking effectiveness
- Group exercises

8. Influencing and engaging customers

- Assessing other people's needs
- Techniques and behaviours for influencing
- Strengthening relationships

9. Following through: practical account planning session

- Real work on account plans
- Plan presentations

