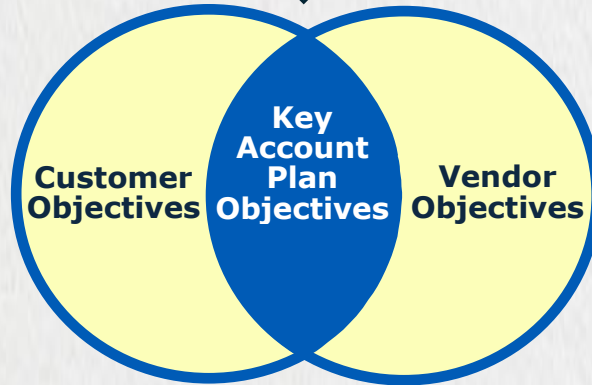


Key Account Planning

An Introduction



How to Accelerate Revenue & Increase Customer Satisfaction

Proven Best Practices for Aligning Customer & Vendor Objectives

Table of Contents

I.	Introduction
II.	Purpose of the Key Account Planning Overview
	How to Use the KAP Overview
	Contents of the KAP Process Overview
III.	Key Account Planning–Overview.....
	Definition of Key Account Planning
	Overview of Key Account Planning
	Objective of Key Account Planning
	Who participates in Key Account Planning?
	VENDOR Roles and Responsibilities:
	The Customer’s Roles and Responsibilities:
	When should Key Account Planning occur?
	Benefits of Key Account Planning
	Key/Joint Account Planning Process
IV.	Understand the Customer’s Business Process (details upon request).....
	Objective
	Deliverables
	Process Steps.....
	Understand Phase–Process Model
V.	Create the Customer Plan Process (details upon request)
	Objective
	Deliverables
	Process Steps.....
	Create Phase–Process Model
VI.	Champion the Customer Plan Process (details upon request).....
	Objective
	Deliverables
	Process Steps.....
	Champion Phase–Process Model.....
VII.	Execute & Update the Customer Plan Process (details upon request)
	Objective
	Deliverables
	Process Steps.....
	Execute Phase–Process Model.....
VIII.	Key Account Planning Presentation
IX.	About the Author

I. KAP Introduction

The Following **Key Account Planning (KAP) Overview** is intended to communicate the basics of KAP to Vendors, Customers, and prospective Customers. KAP is a joint Customer-Vendor planning process that has proven to both accelerate vendor revenue and improve customer satisfaction, with small and large Customers alike.

KAP re-enforces a Vendor's commitment to focus on achieving the Customers' business objectives as their primary goal, or to **“walk a mile in the customer's shoes” - with them.** It will also help the Vendor directly and visibly support the achievement of the Customers' objectives by helping to align Customer and Vendor resources toward achieving both the tactical and strategic objectives of each.

This KAP Overview is a small part of a more comprehensive set of documentation, including workbooks, that will: 1) provide step by step instructions, 2) help document customer and vendor objectives and benefits, 3) suggest customer and vendor plan development participants, 4) provide sample plans, 5) provide worksheets for data capture, 6) provide example Customer and internal Vendor presentations, 7) document mutual plan signoffs, and 8) provide example schedules for plan review and update as an ongoing process.

The author stands ready to teach, coach, and help adapt and execute the KAP process with Vendors and their Customers, both in person and remotely, to meet their unique requirements.

II. Purpose of the Key Account Planning (KAP) Overview

Implementation and on-going use of the Key Account Planning process.

The audience for this guide is all VENDOR personnel who wish to understand the Key Account Planning process conceptually but do not require the details offered in the Key Account Planning Guide.

A separate document, the Key Account Planning Process Guide provides a single, detailed, comprehensive source of information relative to the implementation and on-going use of the Key Account Planning process.

How to Use the KAP Overview

This document includes a table of contents to assist in document navigation.

The document is formatted with a column of white space on the left-hand side of each page to allow space for the entry of notes and/or comments.

The Key Account Planning process itself is most successful if customized to meet the individual Customer and VENDOR teams' needs. Understanding KAP, as a process or way of doing business, is the key to its successful implementation.

Contents of the KAP Process Overview

This guide contains the following sections:

- KAP Introduction (Section I)
- KAP Purpose (Section II)
- KAP Overview (Section III)
 - Definition of Key Account Planning
 - Benefits
 - Process Overview
- KAP Process Steps (Sections IV, V, VI, VIII - Details Available Upon Request)
 - Understand the Customer's Business
 - Create the Vendor-Customer Plan
 - Champion the Vendor-Customer Plan
 - Execute and Update the Vendor-Customer Plan
- Key Account Planning Overview Presentation (Section VIII)
- About the Author (Section IX)

III. Key Account Planning–Overview



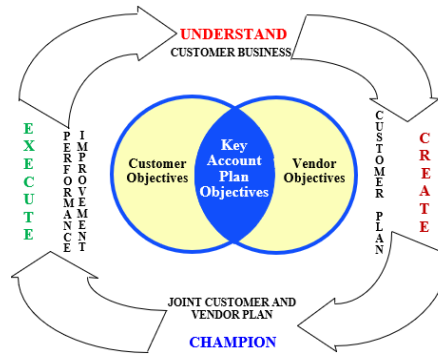
Definition of Key Account Planning

Key Account Planning is a process whereby the Customer supports all VENDOR activity because it is:

- visibly linked to support the Customer's business objectives,
- defined and measured in the Customer's terms,
- mutually beneficial to the VENDOR and the Customer, and
- tracked and measured in a single, easy-to-read, comprehensive document.

Essentially, Key Account Planning is a process where VENDOR and the Customer join forces to create mutual value.





Overview of Key Account Planning

Continuous Process Of:

Understanding

Creating

Championing

Executing

Objective of Key Account Planning

To: Create complete Customer Plans, sponsored, supported, and measured by senior customer executives and the **VENDOR**

So that: Everything we do visibly supports customer business performance improvement resulting in improved customer satisfaction and improved **VENDOR** performance

By: Implementing a Key Account Planning Process which fully engages all relevant customer and **VENDOR** personnel in a continuous program to:

- I. **Understand** the Customer's Business
- II. **Create** the Vendor-Customer Plan
- III. **Champion** the Vendor-Customer Plan
- IV. **Execute** and Update the Vendor-Customer Plan



Who participates in Key Account Planning?

*Equal Participation in:
Creating Objectives.*

*Identifying
Opportunities, and*

*Updating the
Customer Plan*

VENDOR'S Roles and Responsibilities:

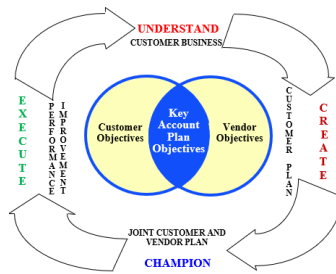
- **Guidance:** applying VENDOR experience and expertise to the role of managing the process itself
- **Identify opportunities** where VENDOR capabilities can be applied to the customer's business to achieve Customer business performance improvement
- **Promote/Champion the Customer Plan** both within both VENDOR and the Customer organizations
- **Apply VENDOR capabilities** to the Customer's business and create Value for the customer

Initially the VENDOR plays the dominant role in the planning process—educating the Customer in the process itself, identifying opportunities for mutual gain, and creating the Vendor-Customer Plan. Eventually, the Customer and VENDOR find themselves on more equal grounds as the Customer becomes more actively involved in the planning process.

The Customer's Roles and Responsibilities:

- **Express their needs** to the VENDOR so that the VENDOR can find opportunities to assist the customer in achieving their business objectives and/or providing business performance improvement.
- **Validate objectives** identified by the VENDOR as providing Value for the Customer
- **Promote/Champion the Vendor Customer Plan** within their own organization
- **Collaborate with the VENDOR** to accomplish and measure achievement of the objectives as mutually agreed during the Key Account Planning process.

Initially the Customer provides input and validation to the planning process. As the Customer learns more about the VENDOR and the VENDOR learns more about the Customer, the Customer's role becomes one of an active participant in creating objectives, identifying opportunities, and updating the Vendor Customer Plan.



Continuous Process

When should Key Account Planning occur?

Key Account Planning is not a once-a-year or once-a-quarter activity.

Key Account Planning is a *continuous* process of:

- learning about the Customer and key Customer executives
Understand
- setting objectives to improve the Customer's business
Create
- agreeing and promoting objectives, measures, and resources
Champion
- accomplishing, measuring, and documenting goals & objectives
Execute

Key Account Planning should happen in some form with important customers, at all times, as a way of doing business.

Although this overview does not describe how to select customers to participate in Key Account Planning, all VENDOR account teams should be making conscious decisions regarding the level at which to engage in Key Account Planning.

- The format of the Key Account Plan can be **one page or a volume**.
- The participants can be **a team of two or more as needed**.
- Development of the Key Account Plan can take **one day or several months**, depending on the **Customer** relationships, size, and organization wherever the Vendor's offerings can be important for the Customer's business success.

The Key Account Planning team should customize the concepts of Key Account Planning to meet the needs of the Customer in question. The process defined in this document is meant to be used as a guideline from which the VENDOR account team and the Customer can customize the Key Account Planning process to meet their individual needs.

- Updates to the Plan should be made *continually* as new opportunities arise or as projects are completed.
- Status updates to the Plan should be completed at least *quarterly*.
- Plan reviews should occur at least *twice a year*.
- A formal review and revision of the Key Account Plan should be undertaken at least *once a year*.



KAP Benefits

Benefits of Key Account Planning

Major benefits derived from Key Account Planning include:

1. Improved Understanding of the Customer's Business and the VENDOR/Customer Relationship:

- VENDOR gains a better understanding of the Customer's perspective on their business:
 - What the Customer is trying to achieve
 - What defines success to the Customer
 - What are the business challenges facing the Customer
 - How the VENDOR can help the Customer to achieve their goals and face their business challenges
- The Customer gains a better understanding of what the VENDOR has to offer:
 - What VENDOR capabilities are available that may benefit the Customer
 - What strategic relationships involving the VENDOR and other companies can benefit the Customer
 - What defines a successful relationship in VENDOR terms
 - How the Customer can use VENDOR capabilities to achieve their goals and face their business challenges
- The VENDOR and the Customer accomplish goals that neither party could have accomplished alone:
 - by sharing information
 - by stimulating innovative ideas through discussion of business issues, and
 - by capitalizing on opportunities to create Value which may have otherwise been overlooked.

2. Mutually defined Goals for the Business and the VENDOR/Customer Relationship:

- VENDOR and the Customer agree on what goals to pursue
- VENDOR and the Customer define action plans and projects to achieve those goals
- VENDOR and the Customer agree on how to measure the success of those projects/action plans
- VENDOR and the Customer eliminate misunderstandings over what will be delivered when and how



KAP Benefits

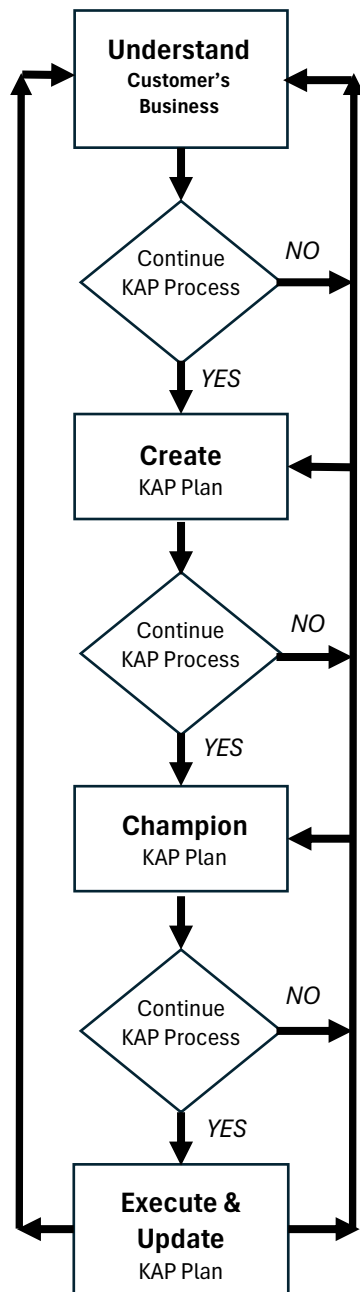
3. Delivery of Value to Improve the Business and/or the VENDOR/Customer Relationship:

- The VENDOR and the Customer participate in joint projects in which Value is measured in the Customer's terms
- The VENDOR and the Customer create Value through business performance improvements
- Frequent status reports keep the VENDOR, and the Customer informed of all activities affecting both companies

An often-unseen benefit to the Customer is that the VENDOR can become a valuable ally to the Customer by facilitating communication between and amongst Customer executives and line management towards the achievement of Customer business objectives. Tactfully executed, KAP can help the VENDOR become a valuable resource to the Customer, across both their rank and organization's structural (division/department) lines.

Key/Joint Account Planning Process Flow

KAP Process Flow



The process overview is a brief description of each phase in the Key Account Planning process. A description of each phase is outlined in the succeeding sections of this document and in greater detail with material available upon request.

Understand

- Understand the Customer's total business
- The "Big Picture" view of what business the customer is in and how the customer does business
- Definition of the customer's business objectives and critical success factors
- Identification of both VENDOR and Customer key participants in the planning process

Create

- Identify Opportunities for Business Performance Improvements
- Create Key Account/VENDOR Objectives
 - Strategic Objective/Mission
 - Relationship Objectives
 - Operational Objectives
 - Sales/Revenue Objectives
- Define Value Propositions
- Develop Preliminary Action Plans to Achieve Objectives

Champion

- Gain Both Customer and VENDOR Concurrence on the Key Account Plan
- Enlist VENDOR and Customer Champions to Promote Key Account Planning across both organizations and commit resources

Execute

- Execute the Key Account Plan
- Deliver Value to the Customer
- Measure the Value of the VENDOR/Customer Relationship

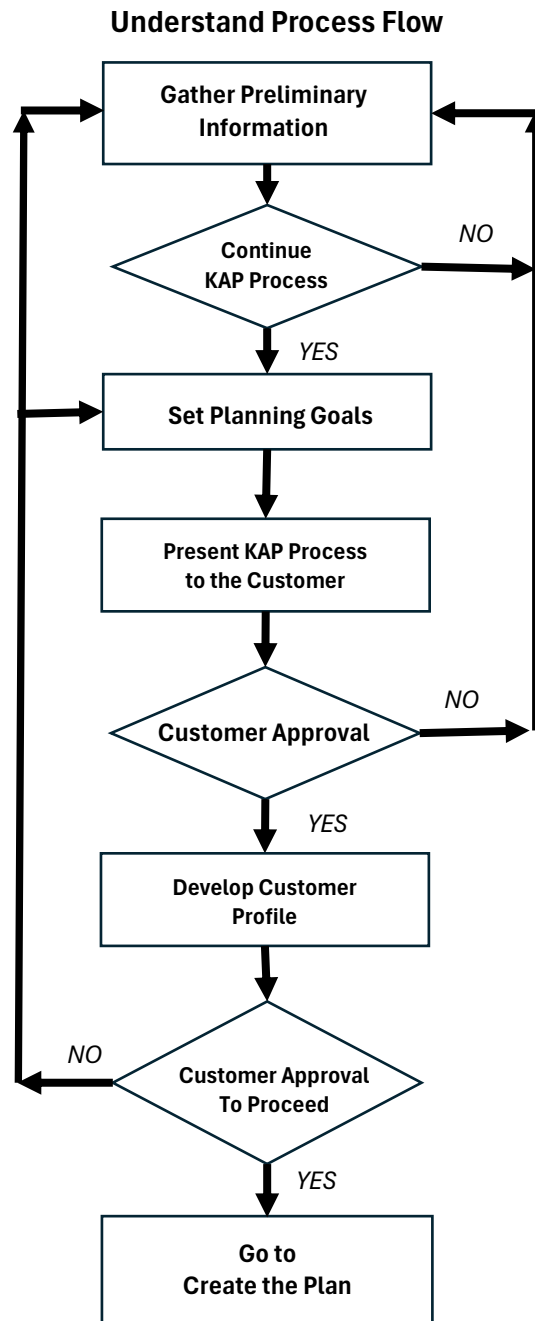
IV. Understand the Customer's Business

Understand Phase–Process Model

Objective

Deliverables

Process Steps.....



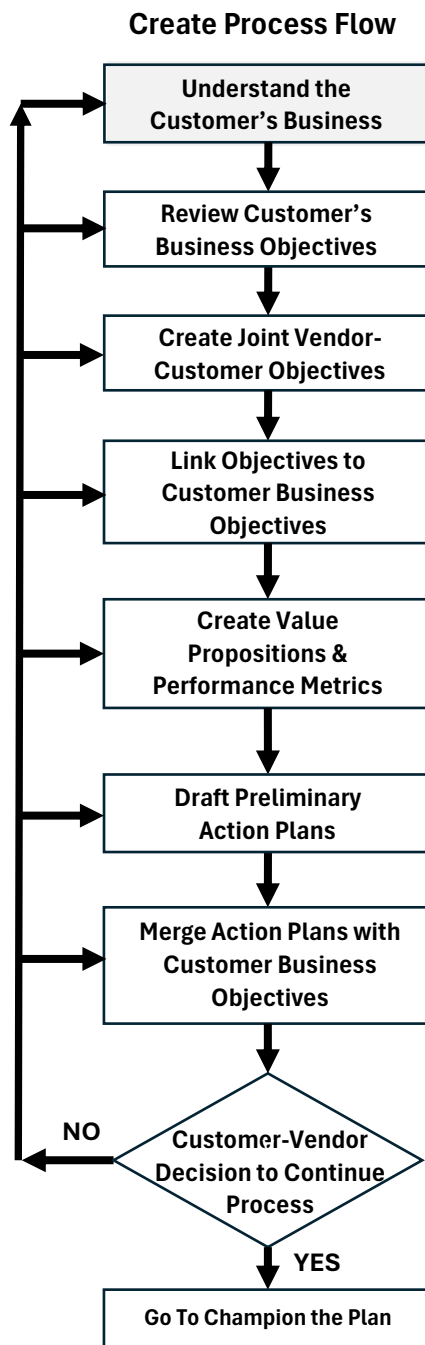
V. Create the Customer Plan

Create Phase–Process Model

Objective

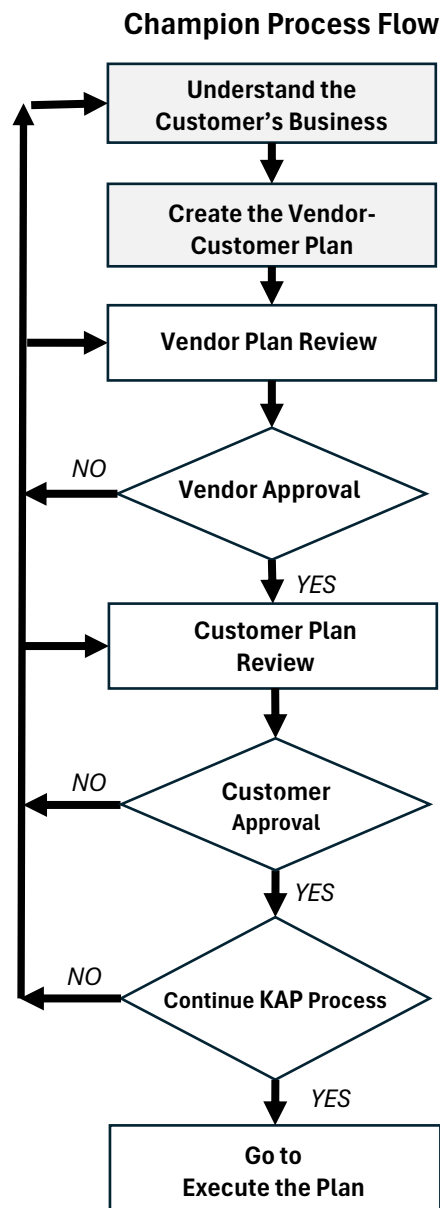
Deliverables

Process Steps.....



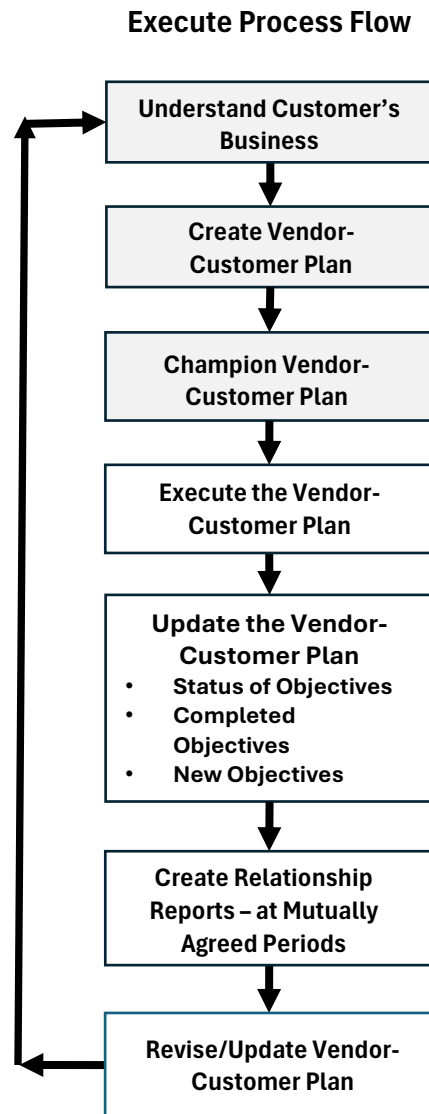
VI. Champion the Customer Plan

Champion Phase–Process Model.....
Objective
Deliverables
Process Steps.....

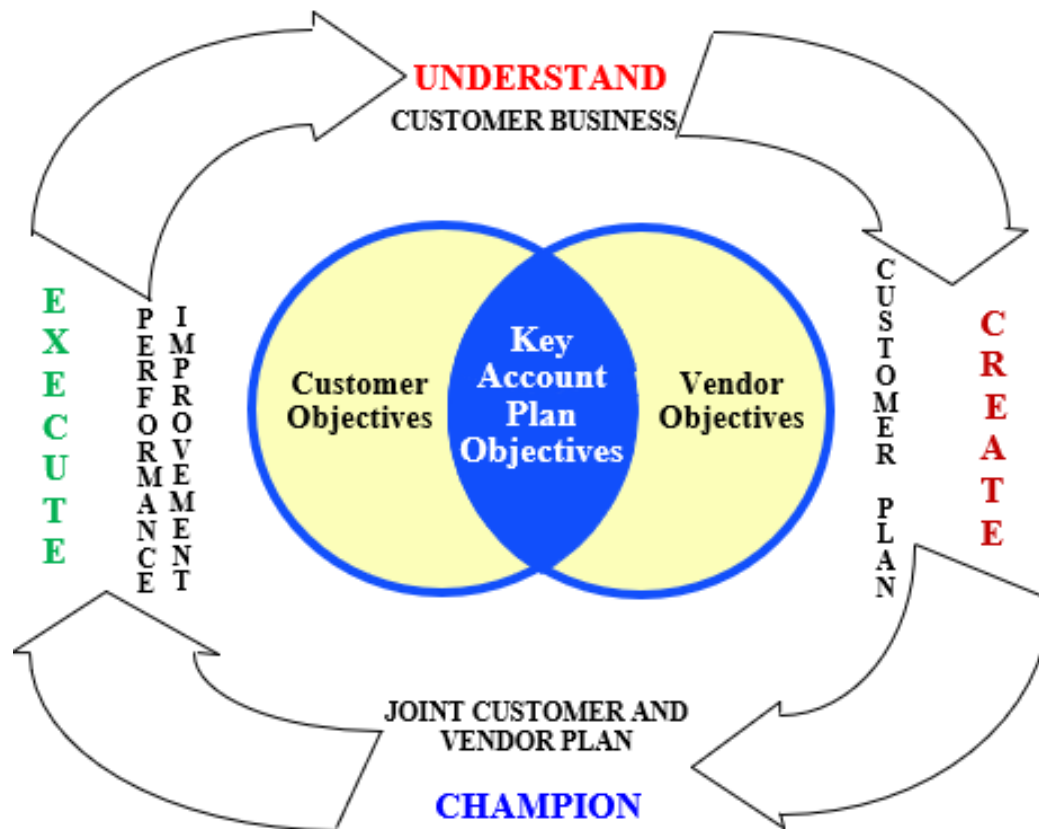


VII. Execute & Update the Customer Plan

Execute Phase–Process Model.....
Objective
Deliverables
Process Steps.....

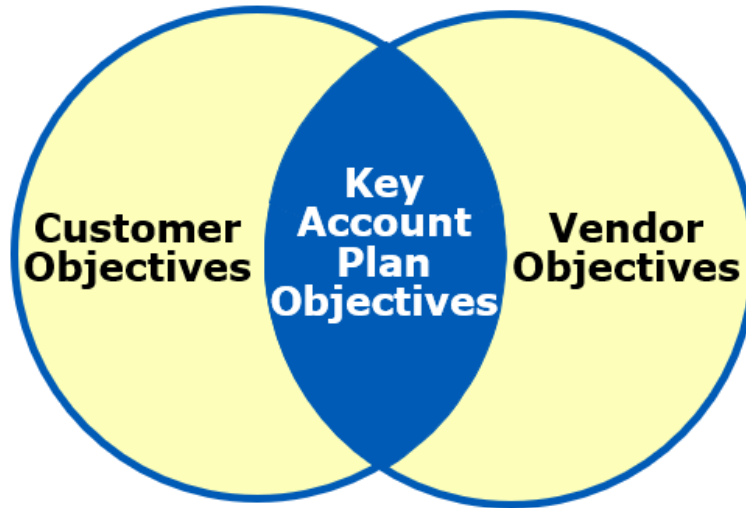


VIII. Key Account Planning Presentation:



Vendor-Customer Key Account Planning (KAP)

Accelerating Sales Productivity



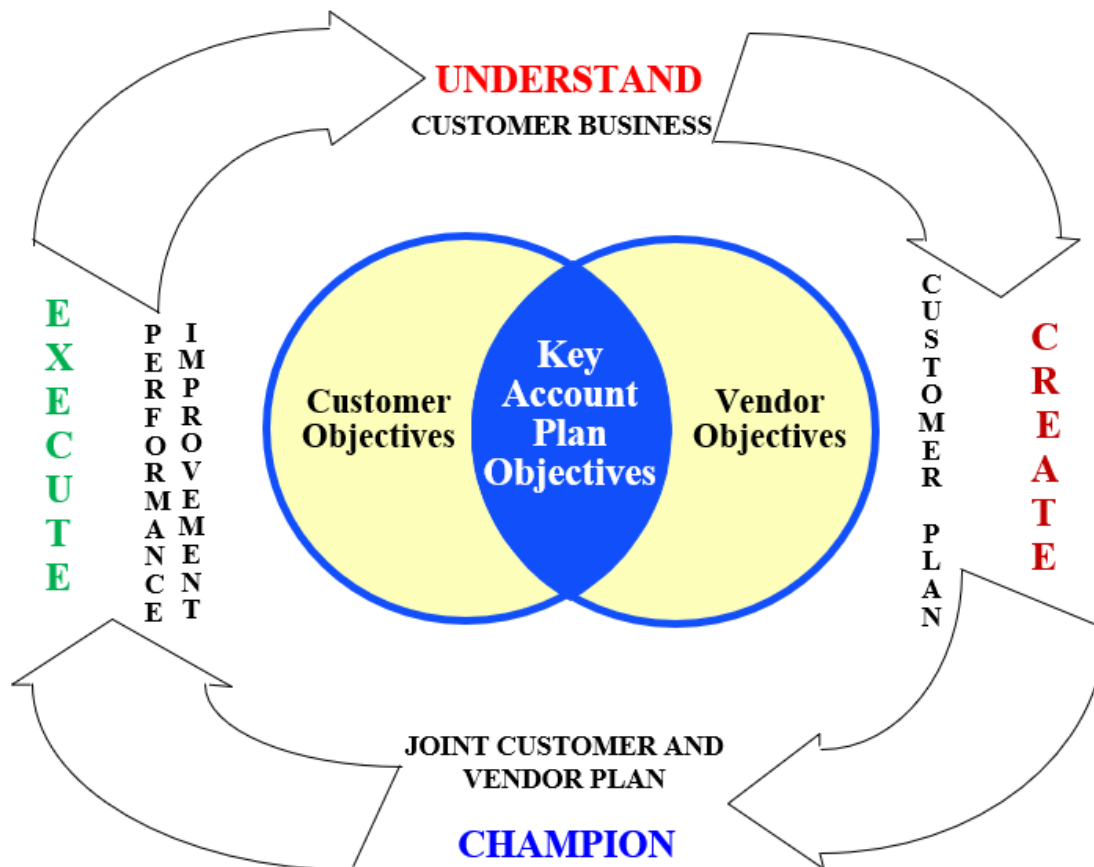
Customer



Vendor



KAP Process



Sponsored, Supported, and Measured

Copyright 2025

KAP Objective

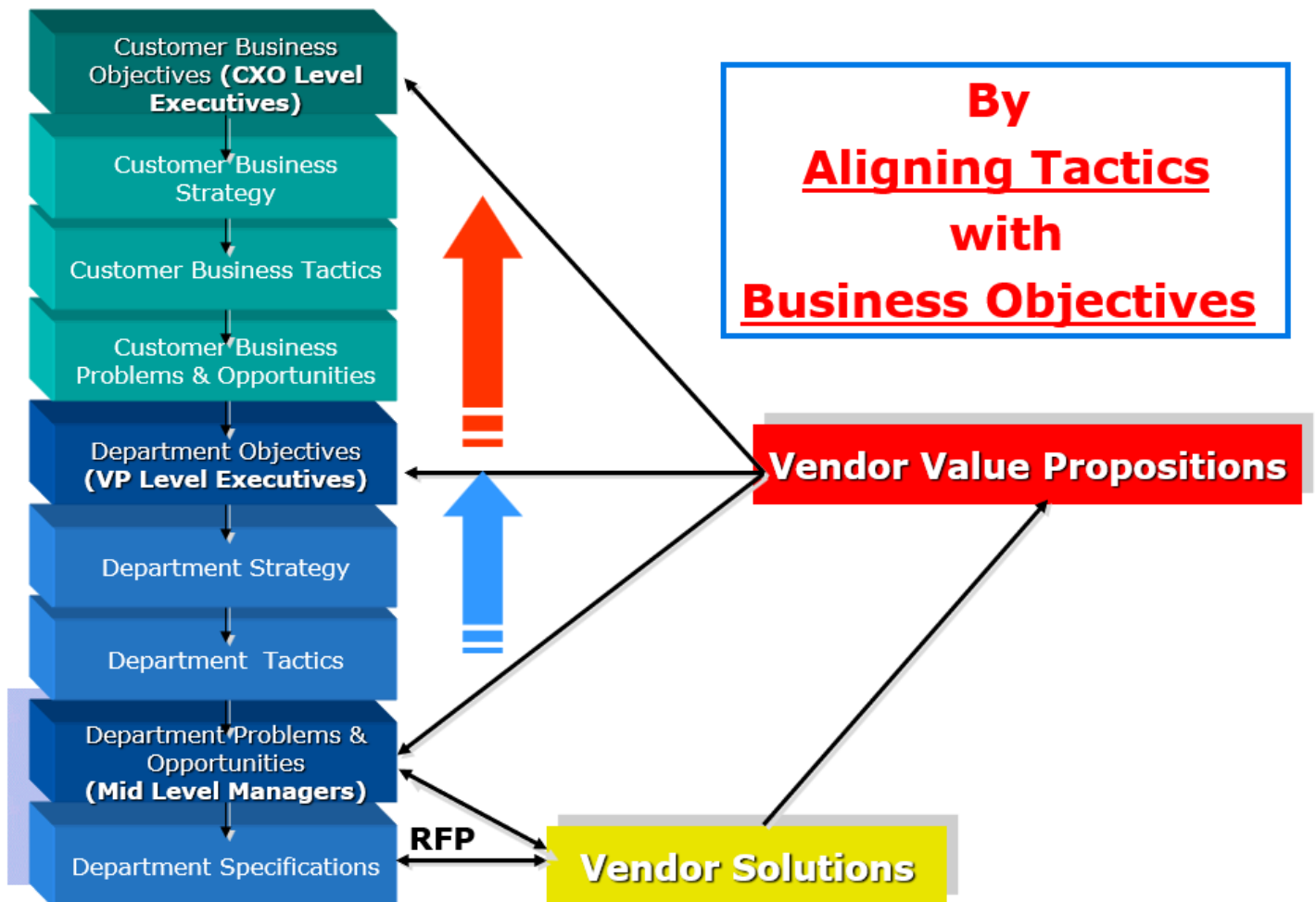
- **To:** Create Customer Plans sponsored, supported, and measured by senior customer executives and (Vendor)
- **So That:** (Vendor) visibly supports customer business performance improvement resulting in improved customer satisfaction and improved (Vendor) Performance
- **By:** Implementing a joint Key Account Planning Process that fully engages all relevant customer and Vendor personnel in a continuous program to:
 - I. **UNDERSTAND** the Customer's Business
 - II. **CREATE** the Customer Plan
 - III. **CHAMPION** the Customer Plan
 - IV. **EXECUTE** and Update the Customer Plan

KAP Benefits

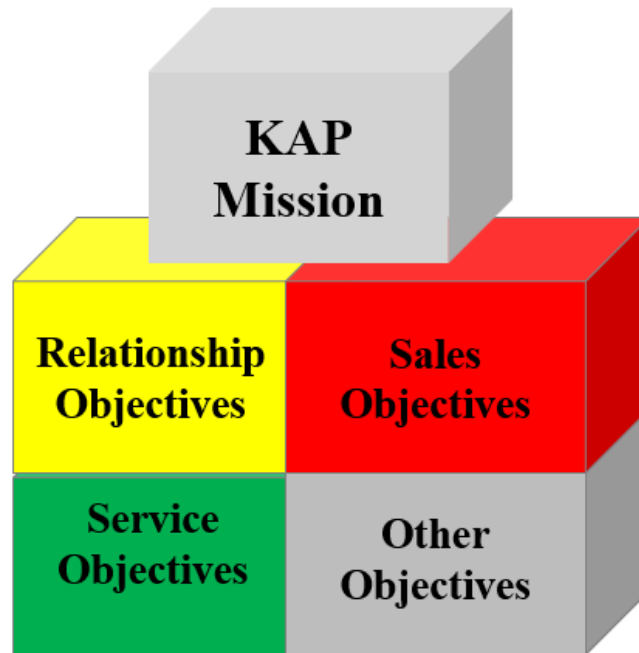
- Focus on business objectives
- Improve business performance
- Access to customer executives
- Improve communications
- Broaden & deepen relationships
- Improve resource utilization



KAP – Helping Tactics Support Strategy

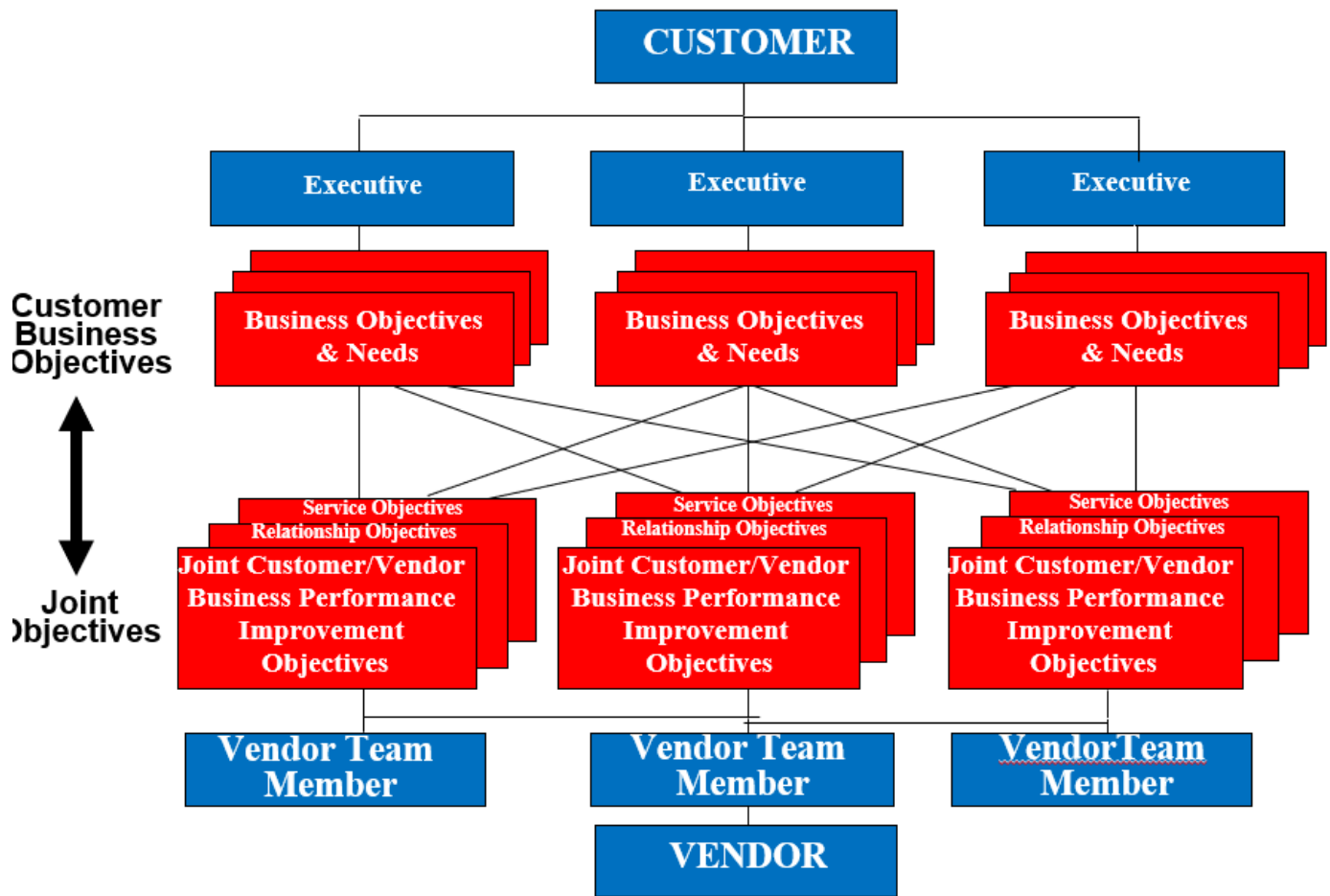


KAP Objective Categories



**The KAP Mission is a unifying statement of the
Goals of the Vendor/Customer relationship**

KAP Schematic



IX Author's Background:

Thomas Wetmore has implemented several versions of this successful joint customer-vendor program with many Vendors and Customers' C-level executives and line management. He has led both training and implementation of the process in the IT industry nation-wide, with five top IT companies in hardware, software, and outsourcing. Tom also developed a sales & marketing training course of the program for the industry's most prominent IT sales training company. Further, he has customized the program for multiple customers, to meet unique needs in their respective markets, including for example, the nation's leading office machines company.

Tom began his career as a successful large computer systems engineer. He migrated to sales and marketing roles where he gained experience with all segments of the IT industry, including hardware, software, communications, and consulting. Tom became Corporate Executive Director of Major Accounts Marketing, reporting directly to the COO at a large global computer company and served as CMO of the \$2+B Communications Division of the world's largest IT outsourcer. As CMO, above, he was designated as a "Corporate Thought Leader" when he served on the Corporate Strategic Planning Committee of this \$20+B public corporation. His success there, in addition to growing international business by over 100% in just two years, helped the corporation change its dialogue with C-level customer executives by helping align their IT functions with their corporate business strategy and objectives.

Tom subsequently founded and co-founded several IT start-ups in hardware, software, and communications markets. He is currently offering his services to companies who would like to apply his expertise to accelerate sales and improve customer relationships.



Thomas P. Wetmore
130 Black Bear Drive
Waltham, MA 02451

Email: thomaswetmore@twetmore.com