Key Account Management Skills

A live online learning course with an expert facilitator.
Two three hour modules

Proven techniques and skills for managing and growing existing customers and business partners. *Business training course.*

Overview

This is not just a training course but a complete program on how to best manage and develop existing accounts. This includes whether they are customers or partners, distributors or resellers. It is specifically designed for quick, consistent, easy and effective account development and management by busy people. The unique process model also makes progress and performance more visible to others. Key action points include:

1. How to increase your business standing and positioning within an account
2. Strategies and techniques for increasing new opportunities and revenue
3. Improved service experience and better account support

Who will benefit?

Account managers, account support and technical team members; senior managers and executives.

Key learning points

- Sell more to existing accounts, increased customer retention and improved customer satisfaction.
- Manage service issues more effectively, through delegation and managing expectations.
- Create a simple but effective account management dashboard, relationship matrix and opportunity roadmap for each key account.
- Gain more influence at a senior level and how to create a 'coach'
- Developing a 'best practice' approach to account management using the tools you have and those you gain on the program.
- Providing more consistency and structure in developing and growing business from both existing accounts and new potential contacts in an account.
- Improving the ability to sell additional services proactively – up-selling and cross-selling.
- Better co-ordination and growth of large accounts and opportunities.
- Using the PROFIT account plan and methodology to update and inform others and plan strategy
- Skills and methods to use when managing and developing both existing customer and target accounts.
- Building on current best practice and integration with existing CRM tools.

Pre-course

The pre-course work is around 30-40 minutes and includes a questionnaire for use by the trainer in personalising the training. Participants will also be asked to bring with them details of three ‘significant’ accounts.

Training format and methodology

This training course will be facilitated to a fully interactive and learner-centred approach. The course has been designed and developed using proven adult learning principles. It has been run successfully many times over recent years.

It includes regular short content summaries, group and individual activities, planning sessions and role-plays.

Options

The course can be combined with other courses to create a longer-term development program. These might include: **Sales presentation skills**, **Sales proposal writing** and **Advanced negotiation skills.**

Brilliant Account Management- Outline

Introduction

- Review of personal objectives and target accounts, plus pre-course work
- Best practice account management – key principles
- Presentation by participants of their target accounts

Performance – how and what to measure

- Introduction to the PROFIT account management model
- Practical account development strategies: overview and case- studies
- Using practical tools to help you manage and measure account performance and success, including profitability and key performance metrics
- Prioritising and managing accounts and customers pro-actively
- Creating a practical one-page account dashboard and SWOT analysis

Relationships

- How to build and manage key relationships within an account
- Qualifying and managing key influencers accurately
- Producing a ‘relationship matrix’ for each account quickly and easily
- How best to approaching and developing new contacts
- Developing a coach or advocate in every client site pro-actively

Objectives and goals: Opportunities

- Developing a cross-selling strategy to integrate solutions and products into the customer’s business as closely as possible
- Knowing how to set, monitor and track key objectives for accounts over the short, medium and long term
- Understanding the concept of long-term customer value and the importance of adapting a customer-focused attitude
- Setting jointly agreed goals, objectives and business plans, and tracking their successful implementation

Feedback and Retention – building loyal and satisfied customers

- How to monitor and track your customer's perception and satisfaction within your organisation and for specific products and services
- Building a personalised satisfaction matrix for each account
- Customer review meetings: best practice in building super-loyalty by regular joint planning events
- Spotting and reacting to early warning signals that may cause an account's loyalty to fade, reduce revenue or cause a customer to change system usage
- Developing a loyalty strategy for key accounts or groups of smaller accounts

Influence

- How to integrate your business style and solutions with the customer's business needs and processes
- Getting your message and strategy across to C-level contacts
- Being able to better anticipate, identify, create, and develop business opportunities within an account.
- Knowing your personalised value message: Differentiating your solutions clearly and accurately with customer/client-matched value statements.

Teamwork and time management

- Working with others inside your organisation to achieve your account goals
- Managing and working with a virtual team and creating cross-departmental communication loops
- Managing your time and accounts effectively on a daily basis
- Setting priorities, goals and account objectives.

Summary

- Putting it all together
- Personal account reviews, personal learning summary and action plans

Overview of the six PROFIT principles

Performance

Good account management goes way beyond the management of opportunities. How you measure your accounts and what you measure will largely determine the direction and focus of your development of both new and existing revenue streams. This module defines best practice account management measures and metrics, both activity and results-based. It examines very practical ways in which performance of both existing and prospective accounts can be easily monitored and progress highlighted. This includes the use of a one-page customised account 'dashboard'.

Relationships

Using a relationship matrix approach, it is vital that relationships are created, developed and co-ordinated at all levels in accounts. You should work on developing both a coach and senior level contacts. Relationship management should be approached in a structured and planned way, using online and offline sources of information.

Opportunities

A good account manager will view an account as an endless revenue stream, with a series of linked or consecutive opportunities. These should cover short, medium and long-term business development cycles. Accurate qualification, regular review and organised persistence are the three essentials for developing opportunities proactively.

Feedback and retention

This section looks in detail at customer and account retention in a positive and pro-active way. First ensuring a high-level of customer satisfaction and then building on this with a series of steps and initiatives. Identifying ‘at risk’ clients is also covered, and how to respond to customer dissatisfaction.

Influence

Good account managers or great influencers? Advanced persuasion, communication and people skills are a pre-requisite to developing accounts and opportunities effectively. This is particularly true in promoting new or solution-based propositions. This session discusses some ideas from participants and introduces some advanced techniques around a consultative or solution-focused approach.

Time management and teamwork

This is an essential skill of effective account management. Prioritisation of accounts, managing daily activities, effective horizontal delegation and co-ordination of others within an account structure are all covered. We also include aspects of virtual team management and effective communication.

More details:

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