Key Account Management Skills

Brill!ant
CUSTOMER SERVICE

Proven techniques and skills for managing and growing existing customers and business partners.

Introduction

This is not just a training course but a complete program on how to best manage and develop existing accounts including, customers, partners, distributors and 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

Objectives

- 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 coordination 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.

Who will benefit?

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

Training 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.

Course Outline

Introduction

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

Performance – how and what to measure

- Introduction to the PROFIT account management model
- Prioritising and managing accounts and customers proactively
- Creating a practical one-page account dashboard and SWOT analysis

Relationships

- How to build and manage key relationships within an account
- Producing a ‘relationship matrix’ for each account quickly and easily
- How best to approaching and developing new contacts

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
- Setting jointly agreed goals, objectives and business plans, and tracking their successful implementation

Course Outline

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
- 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

Influence

- 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 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

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