



The KAM Club

# Key Account Management Strategy

A framework for success

Presented by :

Warwick Brown

Host



Hello World!!

A strong account management solution driven by purpose, supported by process and skilled through practice will accelerate the trajectory of your growth, deliver your objectives and respect your values.

The transformation from supplier to trusted advisor and true partner of your clients begins with a framework and follows through with a strategy to succeed

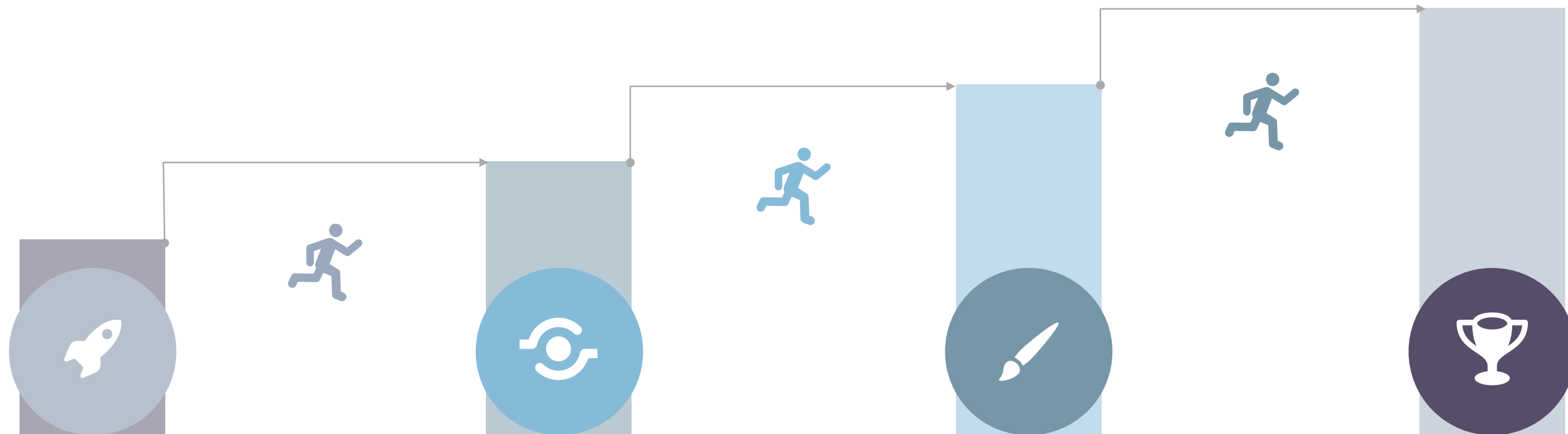
A handwritten signature in black ink that reads "Warwick" with a stylized flourish underneath.

Warwick Brown

Founder at The KAM Club

# Key Account Management Strategy

The journey to successful key account management



## Purpose

Clarity on the account management mission and value and alignment to client and organizational objectives

## Process

A repeatable and sustainable framework that aligns to the customer journey and guides account management activities

## Resources

Essential tools that give account managers the fundamental skills to respond to any situation.

## Success

Combining the 3 P's to create customer value and drive business results.



Purpose

# Defining Key Account Management

How will your clients be managed?



## Key Account Selection

How do you define your most valuable customers? What are the segments? How do clients move in and out of each?



## Scope of Work

What activities are included in the key account management offer and how do you communicate it to clients? Does it differ by segment (e.g. global vs. local)?



## Relationship Intent

Strategic or tactical? Inbound or outbound? Bowtie or diamond?



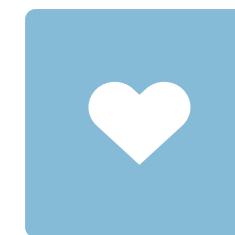
## Portfolio Size

What is the optimal number of clients per account manager? How will you monitor and manage workload and resources?



## Revenue

Can you charge for account management? Are there ancillary services you can develop to grow revenue?



## Evaluation

Establish guidelines to assess key account performance. What do you need to measure?





Process

# C.A.R.E. Framework

An account management framework for profitable, knowledge-based client relationships and mutual growth.



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# 1. Relationship Mapping

Identify your client's key stakeholders, their role, influence and attitude.

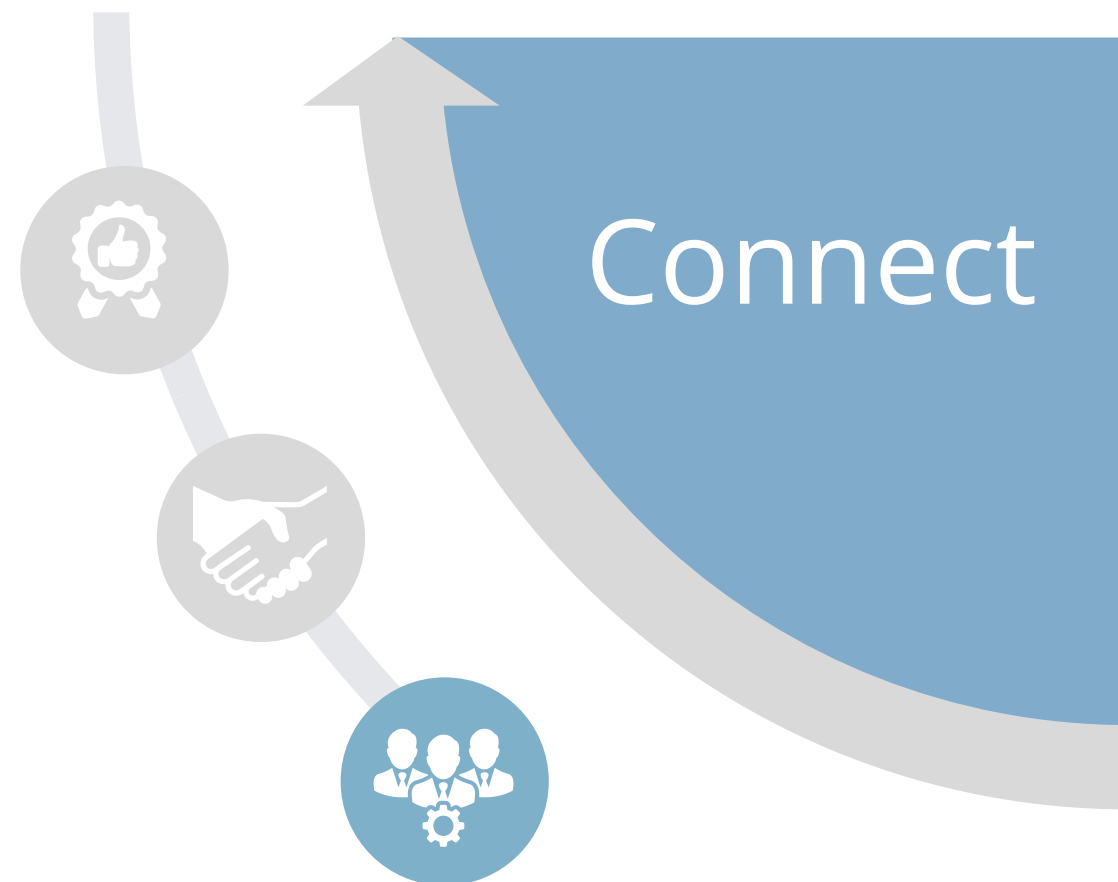
Who are your client's decision makers and influencers and how do they feel about you?

Which stakeholders do you need to develop stronger relationships with?  
Use the GRASP model: Goal, Role, Appeal, State, Power

Are you leveraging your internal networks to scale your relationship building activities?

Who has the power in the relationship? Supplier, mutual or buyer dependent?

Do you understand the customer journey, decision making units and roles in the buying process?



# 2. Executive Sponsorship

Develop institutional, not individual relationships by including top management in your account strategy.

Which senior executives in your organization would be good candidates to partner with you on securing your client?

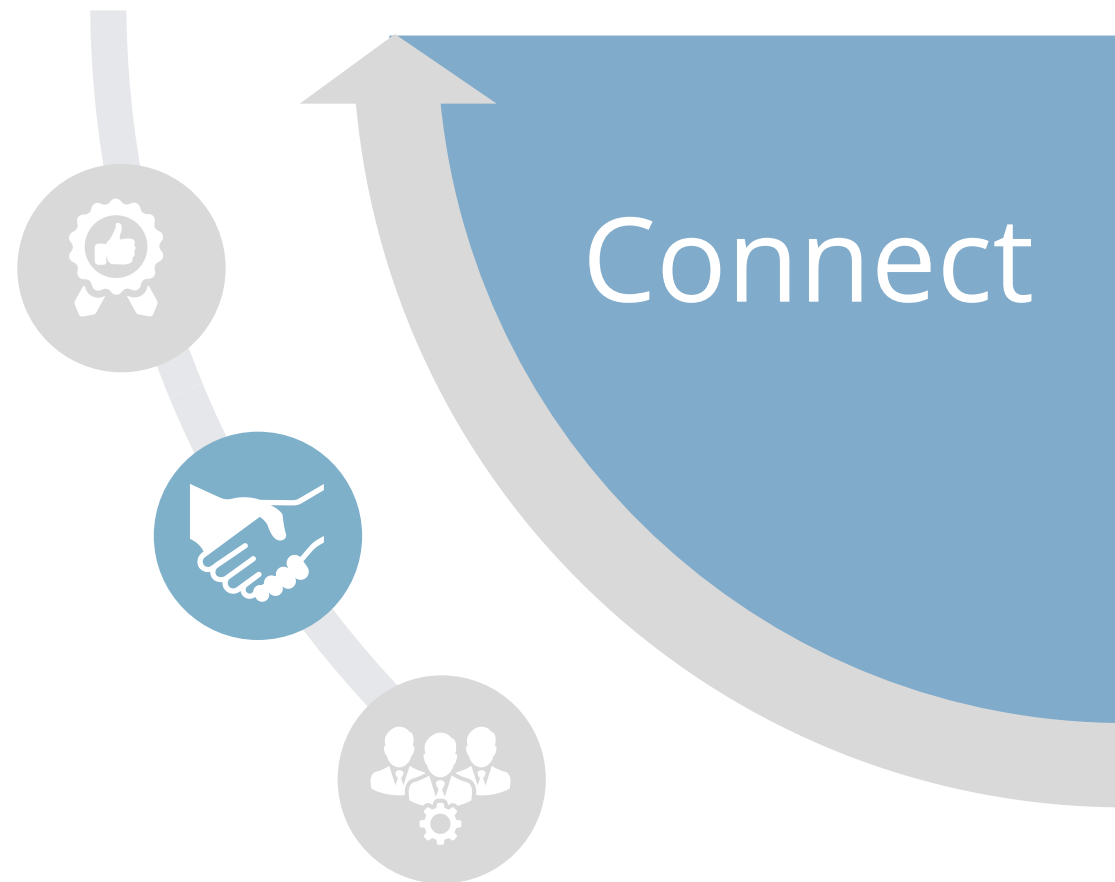
Consider if they should be internal strategic support, client facing resource or both?

Should they have an active role in setting client strategy and participate in external reviews?

Are they capable to develop social and personal relationships with your clients senior executives?

In what ways could you encourage these relationships to develop (focus groups, customer advisory boards, social events etc)

What are the risk of an executive participating in your account management strategy? How can you mitigate them?



# 3. Engagement Strategy

Making engagement a routine to nurture your network and gets results.

Do you have an engagement plan in place to connect, engage and nurture strategic relationships within your client's organisation?

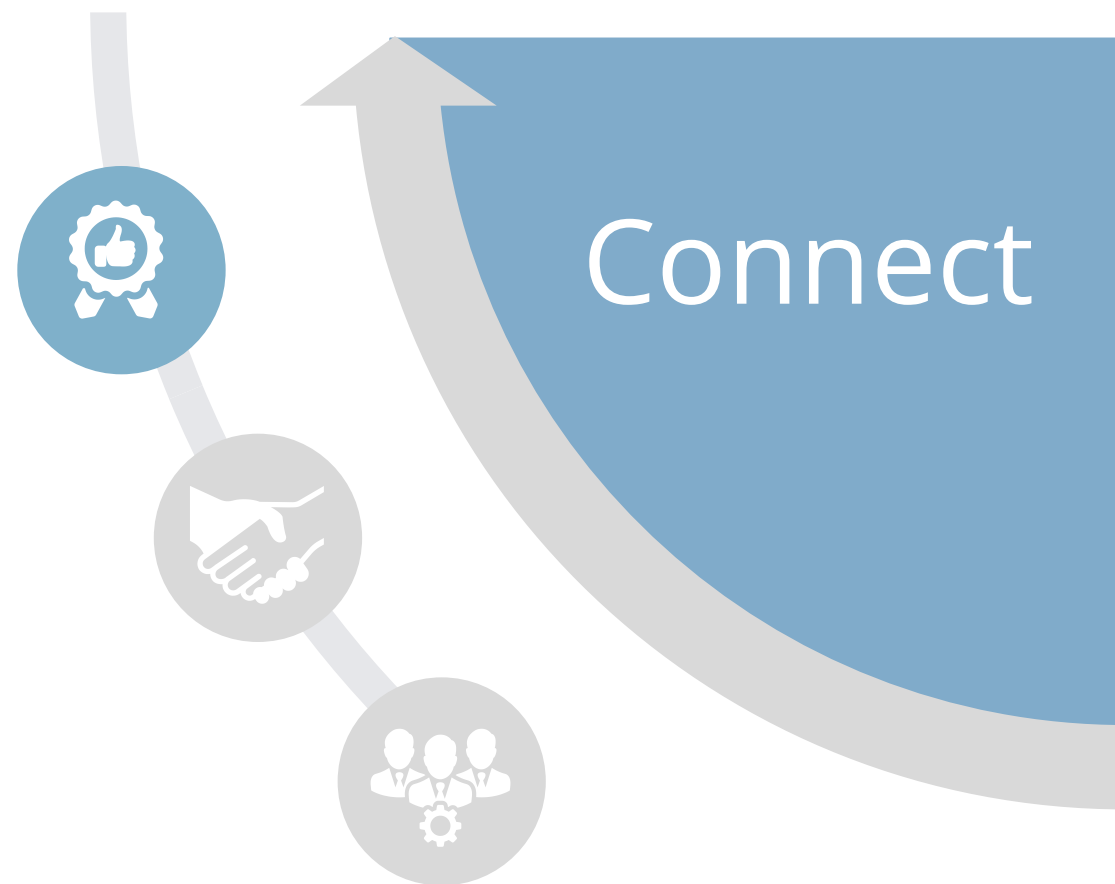
Do you have time scheduled in your diary to action your plan?

Are you able to use automation to scale your client interactions (account based marketing, email marketing etc.)

Are you up-to-date with client news, industry trends and events and using these to share insights that demonstrate expertise and credibility?

Are you adapting your communication style to appeal to your audience: intuitive, analytical, functional, personal.

What specific tactics will you develop to transform detractors into champions?



# 4. Client Analysis

Gain insights by understanding your client's operating environment.



How well do you understand your client's operations?

How well do you understand your client's strategy and business model?

How well do you understand your client's industry and industry drivers, including competitors?

How well do you understand your client's customers and suppliers?

Have you identified key people, decision making process, organisational politics and culture?

How does your solution create value for your client's business? Where are the gaps and how can you help close them?

# 5. Performance Objectives

Identify opportunities and define outcomes for your partnership with your client.



How can you help your client capitalize on strengths or defend weaknesses?

How can you help your client lessen external threats, or remove internal obstacles to pursuing opportunities?

What are the metrics that matter to the client? What are the metrics that matter to you? How can you align them?

What opportunities are there to expand (new markets), cross sell (different products) or upsell (premium products) or gain more share of wallet?

What is the client's budgeting and forecasting cycle?

What has your client contracted to deliver and what are the growth opportunities you have forecast? What are your targets, how will you achieve them and what contingency plans will you make?

# 6. Organizational Alignment

How will you engage with internal stakeholders and client facing teams to ensure alignment with client expectations.



Is there a customer journey map and are you clear on each step as it relates to your role and overall delivery of your solution?

How do you plan to keep internal stakeholders informed of your account strategy and activities when it impacts them?

Which internal stakeholders deal directly with your client? How do ensure 2-way communication on critical issues, ideas and feedback?

Who in your company communicates with the client regarding any service, product, pricing, organisation and other official updates?

Who on the client side should receive information and on what topics?

Are your targets, and your client's objectives aligned with the KPIs of your internal teams – or in conflict? Can you bridge the gaps?



# 7. Value Proposition

Be clear on the benefits you provide to and how to position your unique value.

Have you defined your value proposition for all stakeholders? It will be different for each (e.g. end user vs main contact vs procurement).

Do your own SWOT, PEST and competitive research to form your own opinion on how your differentiated – don't rely just on marketing.

Where are the opportunities to create value? Look for situations that are unworkable, unavoidable, urgent or underserved.

Follow the value proposition formula: What is and what could be + the challenge + the solution + expected results + call to action

Quantify the pain/gain ratio. Are your recommendations worth 10x the gain compared to the effort of implementing them?

Review the B2B and B2C elements of value to understand what's behind purchasing decisions. How can you appeal to personal, intrinsic drivers?



# 8. Account Plans

Create strategic joint plans with your client that create mutual value.

Will all your clients have key account plans? Why and which ones?

Are the plans internal or will you collaborate with your client to create them?

How will you manage and track activities and measure progress?

How frequently will you review the account plans and re-calibrate?

What tools will you use to communicate the plan?

Who needs to sign off on the plan?



# 9. Getting Things Done

Managing your time and activities effectively.

Are you doing things that are out of scope? How can you stop?

Do you need additional resources, training, support or guidance to manage your workload?

Do you have the right systems, processes and tools in place to do your job efficiently. If not, how can you create or secure them?

Are you creating work arounds to hide problems with your solution or by-passing processes? How can you stop?

What can you say “no” to in order to find more time?

Can you do things differently to be more efficient (conference call vs face to face, monthly distribution instead of weekly etc)



# 10. Performance Health Check

Measuring, monitoring and managing account performance and risk.

What are your risk mitigation and management strategies, tactics and action plans? Do you have formal “Get Well Plans” in place?

How do you identify relationship risk factors and defection signals?

What performance objectives will you measure and how will you address gaps (e.g. low share of wallet or service level failures)?

How do you manage stakeholders and assemble internal teams to secure clients

What’s the process to remove clients from being considered at risk?

Are you managing your mindset to stay focused and positive in the face of difficult and challenging situations?



# 11. Business Reviews

Communicating insights that inspire and convince.

Do you have a regular business review cycle in place?

Have you calculated how much time you'll need each quarter to prepare and deliver reviews and blocked it out in your calendar?

Do you have a structured review format in place? How could it be improved?

What does your client expect from the business review?

Do senior stakeholders attend your business reviews? Why/why not?

Are you giving yourself enough time to prepare and rehearse your reviews?



# 12. Retention Strategy

Retaining customers through capture planning for bid avoidance.

Which clients have contracts expiring in the next 15 months?

Do you understand your client's decision making process and have the right relationships in place to get a new term agreed?

What issues might cause your client to reconsider renewing? How can you fix them?

Is your client likely to sign a contract without going to market? Why?

Is the client profitable? What would your commercial offer look like to renew? Any changes to the contract terms?

Who do you need on your win team to help you renew your client (sales, execs, bid writers etc)?







# Resources

# Connect

write your relevant text here

## 1. Relationship Mapping

[Relationship Map Excel Template](#)

[Lesson 4.1 of How to Get in Front of the C-suite & Get Results](#)

## 2. Executive Sponsorship

## 3. Engagement Strategy

[Lesson 4.2 of How to Get in Front of the C-suite & Get Results](#)

Visit the [Resources](#) section of The KAM Club to access relevant content.

# Activate

write your relevant text here

## 4. Client Analysis

[The Account Manager's Guide to Client Research](#)

[Template: Gap Analysis](#)

## 5. Performance Objectives

[Training: How to Sell More](#)

## 6. Organizational Alignment

Visit the [Resources](#) section of The KAM Club to access relevant content.

# Resonate

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## 7. Value Proposition

[Lesson 4.4: How to Get in Front of the C-suite & Get Results](#)

## 8. Account Plans

[Training: The Secret of Effective Strategic Account Plans](#)

[Strategic Account Planning Guides and Templates](#)

## 9. Getting Things Done

[Training: How to Stop Being Busy and Start Being Effective](#)

Visit the [Resources](#) section of The KAM Club to access relevant content.

# Evaluate

write your relevant text here

10. Performance  
Health Check

11. Business Reviews

[Template: Quarterly Business Review  
PowerPoint Presentation](#)

12. Retention Planning

[Guide to Capture Planning for  
Customer Retention](#)

Visit the [Resources](#) section of The KAM Club to access relevant content.

“ Efficiency is doing things right; effectiveness is doing the right things.

- Peter Drucker