KEY ACCOUNT GROWTH PLANNING

MODULE 2 – IDENTIFYING GROWTH FROM THE KEY ACCOUNT'S OWN NEEDS

Pre-Tutorial

ACCOUNT MANAGER'S WORKBOOK

Introduction to the Module

Welcome to Module 2. In this Module we shall explore the needs of the Key Account and the growth opportunities open to you. No doubt you will be familiar with some of these issues and others may be new. The important thing to remember is that we want to consider these ideas not in theory but specifically in relation to your current customers; so, many of the exercises will ask you to think about your specific situation and your particular customers.

This Work Book contains the preparatory work for the Group Tutorial.

When you are ready to start, turn to the next page and the first Task.

Topic 1 – Do we really understand the customer?

This whole Program is all about building an effective Growth Plan – which means that you will be able to present a sensible growth objective based upon a clear understanding of the opportunities. At its heart is an appreciation for the needs of the Key Account itself. In this section we will consider how much we really know. There are no right or wrong answers – just ideas – we will discuss these ideas when we meet in the Tutorial.

To what extent do you really understand the Key Account's own needs?

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Now watch Video Unit 1 in Module 2 (M2 U1) which will discuss some of the typical problems Account Managers face when dealing with the customer's needs.

Task 1 – Could you present the Account's needs to the Account?

Now consider this situation: you bump into the most senior manager in one of your Key Accounts – he or she asks you, "what is your opinion of our strategy?" – could you answer? Remember it is their corporate strategy we are interested in here – what are they trying to do as a business?

How would you answer right now?

My opinion of your strategy is…

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Topic 2 - The two types of Key Account knowledge

Our knowledge of the Key Account must extend from the specific short term needs of the Buyer, through the needs of more senior managers in other operational departments to the Key Account's overall strategy and plans. To help us gets to grips with what should know we can think about knowledge in two parts.

Now watch Video Unit 2 in Module 2 (M2U2) Key Account Knowledge.

What do you think about this approach?

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Topic 3 – Key Account Background Knowledge

Now watch Video Unit 4 in Module 2 (M2 U4) which will introduce and discuss the idea of the background knowledge you need.

Now do this – list the easily available published knowledge you want to be able to access about your Key Account – then define where it is published.

I need to know… Where is it ?

Is there any knowledge you need which is not published? How will you get this?

Topic 3 – Key Account Knowledge – review

Now watch Video Unit 4 Module 2 (M2U4) which will summarise some of the main areas of knowledge which most Account Managers say they require.

How does your list differ?

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Would you make changes?

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Topic 3 – Collecting the strategic information

Now watch Video Unit 5 in Module 2 (M2U5) which discusses collecting the strategic information about the Account.

What do you think about this?

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Now watch Video Unit 6 in Module 2 (M2U6) which summarises the strategic knowledge into a simple structure of – objectives – plans – needs - concerns

Topic 4 -Explaining the ideas - Preparation for the Tutorial

The best way to ensure that you fully understand a topic is to explain it to someone else. Please be ready to explain the following at the Tutorial…

Select one Key Account - describe the information you plan to gather about this customer

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Can you summarise the strategic aspects in terms of objectives – plans – needs – concerns?

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Next step

Now that you have completed all of the pre-Tutorial work, we will look forward to seeing you at the next group session.

KEYACCOUNT GROWTH PLANNING

MODULE 2 – IDENTIFYING GROWTH FROM THE KEY ACCOUNT'S OWN NEEDS

Post-Tutorial

ACCOUNT MANAGER'S WORKBOOK

Post Tutorial Work Book

Welcome to the second part of the Module 2. This Work Book covers the post-Tutorial activity.

When you are ready to start, turn to the next page and the first Task.

Topic 5 – Key Account information

Individual Task – part 1 – static information

Having considered the static information you must hold on each Key Account, consider one of your Key Accounts. List the information you should have (you may already have this) and then complete the list by identifying where the material is published.

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Topic 5 – Key Account information

Individual Task – part 1 – strategic information

Having considered the strategic information you must hold on each Key Account, consider one of your Key Accounts. List the information you should have (you may already have this) and then complete the list by identifying whether you have this information and if not how you plan to get it.

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Topic 6 – Objectives – Plans – Needs - Concerns

Individual Task – part 3

Now summarise the Key Account's Objectives – Plans – Needs - Concerns as you understand them today – where are the gaps?

Objectives **Plans** **Needs** **Concerns**

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Topic 7 – Features and Benefits - Buddy Task

Now that you have a clear understanding about the knowledge which you need for at least one important customer it is worth considering the learning and implications.

Consider the following questions – then make a time to review your answers with your Buddy:

What did you learn from this task?

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What surprised you?

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What will you do differently as a result?

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Topic 8 – Key Account knowledge

Assessed Task

Select one Key Account. Present your understanding of this Key Account including the summary of their O-P-N-C to your Line Manager.

Topic 8 – Key Account Knowledge - Assessed Task – Line Manager's Review

Having reviewed the results of the Assessed Task on Key Account Knowledge, are you satisfied that the Manager:

Has a sufficiently detailed understanding about this customer?	**Yes/No**
Has identified how he/she will get missing knowledge?	**Yes/No**
Has a good understanding of the Objectives-Needs-Plans-Concerns?	**Yes/No**
Could present this assessment to the Key Account itself for agreement?	**Yes/No**

Comments:

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Signed: Name: Position:

Module 2 - Key Points Summary

Use this summary to remind yourself about the key points in this Module – note any point which is not clear and raise this at the next Group Tutorial

- **Most Account Managers do not know enough about the Key Account**
- **We can consider knowledge as 'static' and as dynamic**
- **Static knowledge is easily available and generally published**
- **Dynamic knowledge holds the key to understanding the real needs**
- **The dynamic or strategic knowledge can be summarised as Objectives – Plans – Needs - Concerns**
- **The acid test is to be able to present your summary to the Account for their agreement**
- **Different Managers with the Account will have different needs**
- **Not all needs are equal – getting a sense of the priority is important**

My Capability Scorecard

Complete the Scorecard for Module 2. Identify any issues which need further development. You can discuss these in the next Group Tutorial if you would like input from the Group or with your Group Buddy, your Line Manager or by booking a one-to-one coaching session with a Group Coach.

CAPABILITY BEST PRACTICE SCORECARD – KA GROWTH MODULE 2 - GROWTH FROM KA OWN NEEDS				
This Scorecard defines the Best Practice for Module 2 Growth Program. Having completed the Module, each Delegate should be able to answer 'Yes' with a high confidence level for each of the 10 Best Practice Criteria				
	Best Practice Component	**Yes/No**	**My confidence level (1-10)**	**Is there anything I must do to improve this?**
1	I recognise the importance of really understanding the Key Account			
2	I understand that the short term demands are driven by the long term needs			
3	I have identified the 'static' information I should hold			
4	I have identified where this information is held for my Key Accounts			
5	I have defined the strategic information I should know about my Key Accounts			
6	I have identified the missing information			
7	I have an active plan to get the missing information			
8	I can explain the Key Account's Objectives – Plans – Needs - Concerns			
9	I feel confident that I could present this summary to the Key Account for agreement			
10	I have defined the different needs for different KA managers			

My Personal Review and Action Plan

I have achieved the following since the last Module

As a result of this Module, I will do the following

What?	By when?	Done?