

KEY ACCOUNT GROWTH PLANNING
MODULE 6 – SITUATION SUMMARY &
OPPORTUNITY ANALYSIS

Pre-Tutorial

ACCOUNT MANAGER'S WORKBOOK



Welcome to Module 6 – Situation Summary & Opportunity Analysis

Welcome to Module 6. In this Module we shall summary our analysis and identify the best growth opportunities.

If we have done the analysis comprehensively then it is likely that we will have identified many opportunities – more than are practical. In this Module we shall explore the process for prioritizing the opportunities.

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 Topic.

Topic 1 – It is all about needs

The good news is that most of the hard work is now done. The task now is to select the nest opportunities from what should be a longer list. Watch the first video in Module 6 (M6U1) – Introduction.

When you review your analysis so far – have you see some obvious opportunities for growth? Have you found some things which you would not have considered at the start?

.....

.....

.....

.....

.....

.....

.....

.....

Topic 2 – The analysis summary

Now watch Video 2 in Module 6 (M6U2) which discusses the summary. Note that the video uses an example of a generic summary form. You can use this form, create your own or use the one which your company recommends (if it has one). The format is not important - it is the content which is important.

Which format will you use?

.....

.....

.....

.....

Now watch Video 3 (M6U3) which is an example of a completed analysis – do you have any questions for the Group or the Tutor?

.....

.....

.....

.....

Topic 3 – Task 1 – Completing the analysis

The next step is to complete your own summary analysis using the information from the earlier modules. Work through the information you have already collected concerning the current situation and summarise the opportunities in the way the module suggests.

.....

.....

.....

.....

.....

.....

.....

.....

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...

Explain the process from information gathering to analysis summary – what are the pitfalls and learning for you?

.....

.....

.....

What is difficult?

.....

.....

.....

.....

What would you do differently?

.....

.....

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.

KEY ACCOUNT GROWTH PLANNING
MODULE 6 – SITUATION SUMMARY &
OPPORTUNITY ANALYSIS
Post-Tutorial

ACCOUNT MANAGER'S WORKBOOK



Post Tutorial WorkBook

Welcome to the second part of the Module 6. This Work Book covers the post-Tutorial activity.

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

Topic 1 – Analysis

Individual Task – part 1

Review your analysis again – is there anything you want to change?

.....

.....

.....

.....

.....

.....

.....

.....

.....

Topic 2 – Analysis - Buddy Task

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

What have you thought about since the Tutorial?

.....

.....

.....

What is difficult – what is easy? What will you do differently for the new one?

.....

.....

.....

What is the most important thing I have gained from this Module?

.....

.....

.....

Topic 3 – Analysis

Assessed Task

Prepare and present you best analysis to your Line Manager.

Topic 3 – Opportunity assessment - Assessed Task – Line Manager’s Review

Having reviewed the results of the Assessed Task on Customer Needs Analysis, are you satisfied that the Manager:

Has identified all the growth options? **Yes/No**

Has prioritized the options effectively? **Yes/No**

Is able to achieve the growth options? **Yes/No**

Will be able to present a suitable solution to the key account? **Yes/No**

Comments:

.....

.....

.....

Signed:

Name:

Position:

Module 6 - 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

- **The analysis should be a fairly simple exercise if the earlier stages has been completed**
- **The KA needs can be summarised using the O-P-N-C format**
- **The market needs are those which will impact the key account and your business**
- **Your own needs and plans are those which are relevant to the key account**
- **Ensure that you are considering the implications**
- **Aim to prioritise based on clear criteria**
- **Include current business which must be defended**
- **Review the list to ensure it is realistic**

My Capability Scorecard

Complete the Scorecard for Module 6. 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 - GROWTH MODULE 6 OPPORTUNITY ANALYSIS			
This Scorecard defines the Best Practice for Module 6. Having completed the Module, each Manager 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 have identified the main opportunities for growth with the key account			
2 I have listed them using a simple format			
3 I recognise that the opportunities must be specific to the key account in consideration			
4 I realise the I should focus on the best opportunities			
5 I have summarised the key account's growth opportunities using the OPNC format			
6 I have selected the market trends most applicable to my business with the key account			
7 I have ensured that my company's goals and plans are those relevant to the key account			
8 I have prioritized the list			
9 I have included business which must be defended			
10 I am confident that I have a comprehensive summary and have selected the best opportunities			

