

KEY ACCOUNT GROWTH PLANNING
***MODULE 7 – SETTING GROWTH OBJECTIVES &
DEFINING THE ACTION PLAN***
Pre-Tutorial

ACCOUNT MANAGER'S WORKBOOK



Welcome to Module 7 – Setting the growth objectives & defining the action plan

Welcome to Module 7. In this Module we shall select just the few opportunities to develop with the key account. Then we shall set the specific growth objectives for these opportunities and finally create the action plan itself.

This is the point in the process where we can finally define the growth objectives and action secure in the knowledge that there are grounded in reality.

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 – Select the opportunities

Watch the first video in Module 7 (M7U1) – Introduction.

Which opportunities will you select for the growth with the customer?

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Topic 2 – Setting objectives

Watch Video 2 (M7U2) which is a worked example.

Now set your objectives for the selected opportunities using your preferred format

Topic 3 – Write the plan

Finally complete the activity plan for the coming 12 months – the list of those things which must be done to achieve the objectives – again use your preferred format

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Topic 5 -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...

How easy was the process?

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How easy was it to summarise the information for the plan?

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How easy was it to create the plan?

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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.

KEY ACCOUNT GROWTH PLANNING
MODULE 7 – SETTING GROWTH OBJECTIVES &
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Post-Tutorial

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Post Tutorial WorkBook

Welcome to the second part of the Module 7. 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 – Reviewing the plan

Individual Task – part 1

Consider everything said at the Tutorial - is there anything in your plan you want to change?

Topic 2 – Questions - Buddy Task

Now you have a clear understanding about the growth plan.

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

How easy was to write the plan?

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What am I most concerned about - how can I overcome this?

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

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Topic 3 – The plan

Assessed Task

Prepare the key account growth plan. Deliver the presentation to your line manager.

Topic 3 – The growth plan - Assessed Task – Line Manager’s Review

Having reviewed the results of the Assessed Task on The Growth Plan, are you satisfied that the Manager:

Has set growth objectives reflecting the opportunities? **Yes/No**

Has defined all the activity required to achieve the objectives? **Yes/No**

Has understood the implications of the plan? **Yes/No**

Is confident and able to achieve the plan? **Yes/No**

Comments:

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Signed:

Name:

Position:

Module 7 - 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

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- **Select the best growth opportunities for the key account**
 - **Write clear objectives for each**
 - **Set out the activity which is required**
 - **Ensure you have considered the implications**
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My Capability Scorecard

Complete the Scorecard for Module 7. 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 7 THE GROWTH PLAN			
This Scorecard defines the Best Practice for Module 7. 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 selected the best growth opportunities			
2 I have set objectives for each selected opportunity			
3 Each objective is measurable, achievable, time bound and compatible with the strategy			
4 I have set quarterly objectives – I know what I must achieve every quarter			
5 I have identified the resources I need to achieve the objectives			
6 I have defined the additional support I need			
7 I have defined all the necessary actions and have written the Action Plan			
8 I have defined who will do what and by when			
9 I have agreed the action with everyone – they all know what they have to do			
10 I have presented the Plan to my Line Manager for agreement			

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?
