

KEY ACCOUNT GROWTH PLANNING
MODULE 8 – AGREEING THE GROWTH PLAN
Pre-Tutorial

ACCOUNT MANAGER'S WORKBOOK



Welcome to Module 8 – Agreeing the growth plan

Welcome to Module 8. In this Module we shall seek formal agreement for the plan from our company and with the key account itself.

This is the point in the process where we argue the case for our plan and have it agreed.

Note that if you are following a joint business planning process with your key account then of course managers from the key account itself will be contributing to the joint growth plan and you and they will be seeking formal agreement from the senior management in both your company and the key account.

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 – Defining who should agree the plan

Watch the first video in Module 8 (M8U1) – Introduction.

Who needs to agree to your plan?

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Topic 2 – Presenting the plan

Watch Video 2 (M8U2) which briefly discusses presenting the plan.

How will you present the plan?

What parts of the plan should be emphasized?

Do you need to prepare addition slides?

Will this be one presentation or more than one?

Topic 3 – Preparing for questions and objections

List the people who will be at the presentation – then list their primary interests - what will each person expect to see?

List the questions or objections you can expect from each person – then list your answers

Who	Interest	Likely question	My answer
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.....			
.....			
.....			
.....			
.....			
.....			

Topic 4 –Prepare the presentation

Now prepare your presentation slides along with supporting material such as hand-outs, examples, data sheets and so on.

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 8 – AGREEING THE GROWTH PLAN
Post-Tutorial

ACCOUNT MANAGER'S WORKBOOK



Post Tutorial WorkBook

Welcome to the second part of the Module 8. 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 presentation or plan which you want to change?

Should you present the plan in a different way?

Topic 2 – Questions - Buddy Task

Now you have a clear understanding about the presentation.

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

How easy was it to present 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 presentation

Assessed Task

Revise your presentation if necessary. 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 Presentation, are you satisfied that the Manager:

Has written an effective presentation? **Yes/No**

Has emphasized all the main points persuasively? **Yes/No**

Can present the plan with confidence? **Yes/No**

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

Comments:

.....

.....

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Signed:

Name:

Position:

Module 8 - 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

- **Think clearly about the audience and their interests and expectations**
 - **Consider what questions and objections you may encounter**
 - **Focus on the main benefits**
 - **Ensure it is clear what you want agreement for**
 - **Ensure you have simple slides and useful support material**
 - **Practice the presentation**
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My Capability Scorecard

Complete the Scorecard for Module 8. 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 8 AGREEING THE GROWTH PLAN			
This Scorecard defines the Best Practice for Module 8. 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 who must agree and who must support the plan			
2 I have identified what I want I want each person to agree to			
3 I have identified the interests and expectations of each person			
4 I have identified the likely questions and objections from each person			
5 I have defined my answers in each case			
6 I have selected or produced simple slides to support the presentation			
7 I have collected additional supporting material where applicable			
8 I have produced the presentation			
9 I have investigated the location, timing, facilities and so on for the presentation			
10 I have practiced the presentation			

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?
