SAGE

SALES:
ACCOUNT MANAGEMENT

KEY ACCOUNT PLANNING

LENGTH
3 Hours + Coaching

CERTIFICATION
This is a required module for:
- Key Account Management Specialization

FORMAT
Live

Large accounts are grown, not sold. They're grown through thoughtful, intelligent planning and steady execution. Most experienced Sales Reps will be able to anticipate which of their accounts can become whales, but it takes a skilled, committed, and dedicated Rep to actually make that happen.

In this planning-focused module, we roll up the sleeves with participants to guide them through a Key Account Planning workshop that includes selecting their Key Account(s), understanding and assessing the health of an account, measuring competition, identifying and mapping key personnel and stakeholders, and developing a comprehensive enterprise plan for that account.

LEARNING OUTCOMES

After taking this course, you should be able to:
- Identify the Key Accounts in your sales territory
- Create, explain, and defend your Key Account Plan in front of a panel of reviewers
- Start executing your Key Account Plan immediately

COURSE OUTLINE

Key Account Selection
- What is a Key Account?
- Exercise: Key Account selection

Understanding The Account
- SWOT analysis
- Our account footprint
- Competitive landscape
- Contact Mapping

Creating An Account Plan
- Objective Setting and Prioritization of Objectives
- Business Development planning
- Relationship Management planning
- Customer Success planning
- Internal resources and stakeholder alignment

Finalizing The Key Account Plan
- Exercise: Create a Key Account Plan using the SAGE Key Account Plan Template
- Exercise: Present your Key Account Plan to a panel of internal stakeholders
- Incorporate feedback, make revisions, and obtain internal sign-off