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Relationship Status

Account Manager:
Customer:

1. What type of relationship do you want – how would you describe it?

2. What type of relationship does your customer want?

How close are you to (1) above (%)?

How close are you to (2) above (%)?

What do you need to do to achieve (1)?

- 1.
- 2.
- 3.
- 4.
- 5.

What do you need to do to achieve (2)?

- 1.
- 2.
- 3.
- 4.
- 5.

How well do you know your Customer?

Score each element out of 10:

0 = not at all: 10 = couldn't be better

Do you know:	Score
Your key customer's products and how you add value to them?	
The customer's strategic plan?	
The customer's financial health (ratios etc.)?	
The customer's business processes (logistics, purchasing, production, etc.)?	
What the customer values/needs from its suppliers?	
Your product as a proportion of the customer's spending?	
Which of your competitors does the customer use; why and how it rates them?	
How much attributable (interface) costs should be allocated to your customer?	
The real profitability of the customer to you?	
How long it takes to make a profit on a major new customer?	
Total	
Score as a percentage %	

That's how much you know about your KEY customer...

SWOT Analysis

Customer: _____

Consider the key issues for each area of your customer/prospect

STRENGTHS

WEAKNESSES

OPPORTUNITIES

THREATS

Segmentation

Customer: _____

Consider the key issues for this customer resulting from the SWOT analysis.

**Critical Success
Factors**

**Critical Success
Factor Action plan**

Key Account Management Check List

Score each element out of 10: 0 = not at all: 10 = couldn't be better

Have you...	Score
1. Categorized your customers?	
2. Matched your relationship with each customer type?	
3. Got an up-to-date copy of your customer's organizational chart?	
4. Got a good understanding of the relevance and authority of each contact within your customer?	
5. Got an understanding about how each contact feels about your company ... and you?	
6. Looked at the overall picture and identified relationship gaps that need addressing?	
7. Got strong relationships with people who are really important, or are they with nice but less significant people?	
8. Got poor or weak relationships with people who are really important with your customer?	
9. Got good relationships across all functions of the customer?	
10. Got support from colleagues in the relevant functions to be part of the overall relationship with your customer?	
11. Got all levels in the customer covered or are you only concentrating on one level? You could be missing important people at Board level or retail assistant level.	
12. The ability and opportunity to solve glitches in the supplier/customer process?	
13. Helped improve your customer's margin?	
14. Become a good source of information for your customer regarding issues that are not easily available, i.e. market trends, research data, etc.?	
15. Offered them expert advice on something that is new or difficult for them?	
16. Delivered training to their staff to help them market your products more effectively?	
Total	
Score/160	As a percentage.....%

You have now identified which areas of your Key Account Management you need to work on.

Key Account Management Activity

Account Manager: _____

Sector: _____

What major activities will you become involved in to ensure you adopt a Key Account Management approach?

Activity	Target date
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1.
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2.
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3.
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4.
----	-------	--	-------

5.
----	-------	--	-------

6.
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7.
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8.
----	-------	--	-------

9.
----	-------	--	-------

10.
-----	-------	--	-------

How committed are you to make these activities happen?

Circle one number...

1 2 3 4 5 6 7 8 9 10

(if you circle any number other than 10, you're actually not committed at all!)

Effective Customer Meetings

Company:

Who should be there:

Position

Position

Position

Purpose of meeting:

Primary Objective:

Secondary Objective:

What will make this a beneficial meeting from the CUSTOMER'S perspective?

What "HOOK STATEMENT" will I use to immediately engage the contact:

What OBJECTIONS might I receive?

What are my JUSTIFICATION STATEMENTS to manage those Objections?