HELPING™ **CLIENTS** SUCCEED

Account Planning & Execution

WHAT WOULD YOUR KEY CUSTOMERS SAY ABOUT YOUR ACCOUNT TEAMS?

THE CHALLENGE

It’s not enough to hope your key customers consider your account teams credible business partners in the areas they value most. Having an account planning process and tool that help account teams continuously monitor the changing nature of what their customers value will enable them to focus (and refocus) their strategy and actions appropriately.

The challenge of account management is to consistently demonstrate a solid understanding of the customer’s strategic and technical opportunities. Top-performing account managers challenge their customers with insights and proposed solutions to critical issues. They deepen and expand their account relationships as they help their customers transform and optimize their business.

WHAT MAKES THE DIFFERENCE?

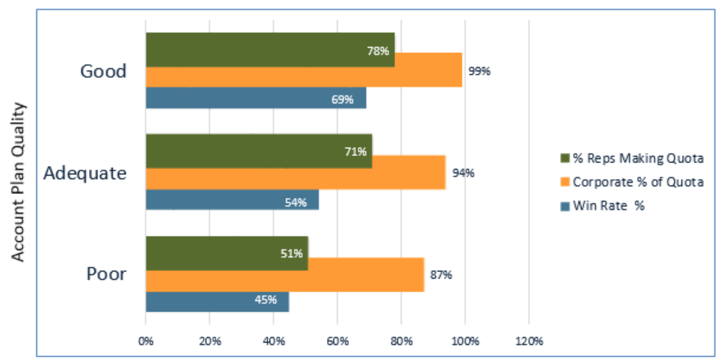
In this program, we help account managers **KNOW** their customers’ business, **GROW** the right customer relationships and **SUSTAIN** those relationships over the long term by teaching them to:

- Create value for the right customers
- Develop the right elements in their account plan – nothing more, nothing less
- Deepen and expand critical customer relationships
- Measure progress
- Communicate their achievements to the right people

FranklinCovey partners with Revegy to provide an online account planning tool that will help account teams take relationship management to the next level. We can integrate our account plan with most CRM platforms.

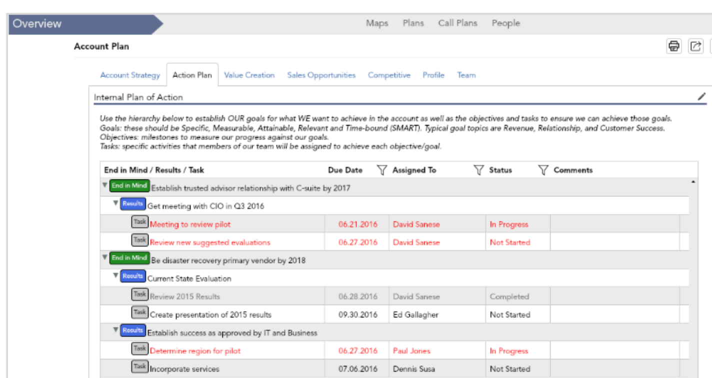
KNOW GROW SUSTAIN

BUSINESS OUTCOMES BASED ON ACCOUNT PLANNING QUALITY



Results from CSO Insights 2014 Sales Management Optimization Study

COLLABORATE, ACHIEVE, COMMUNICATE



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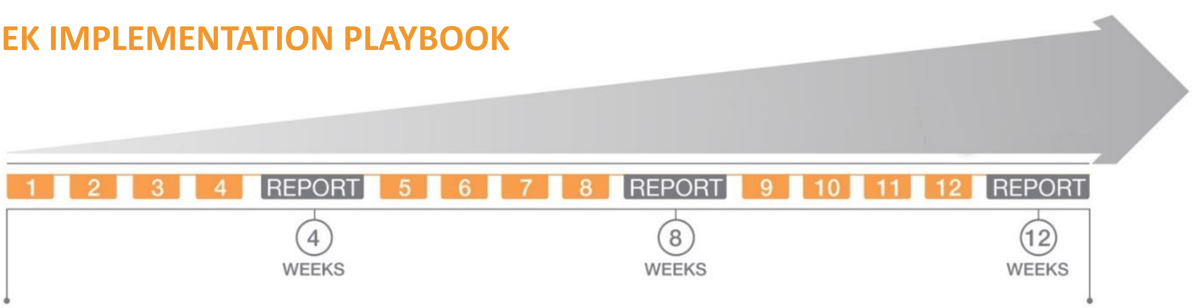
THE ULTIMATE COMPETITIVE ADVANTAGE

MODULE	AFTER THIS ONE-DAY WORK SESSION, PARTICIPANTS WILL:
WHY ACCOUNT PLANNING?	• Establish the importance and benefits of a high-quality account plan and identify best practices of top-performing account teams
KNOW YOUR ACCOUNT	• Put the Big Ideas of high-quality account planning and execution into practice • Assess their key customers' perception of their performance in the five key drivers of account planning • Analyze their customers' trends and spends • Create strategy statements to clarify what they want to be to their customers • Identify customer "coaches" and "resistors" and develop a relationship plan for those with influence
GROW YOUR ACCOUNT	• Recognize how trust affects speed and cost in a customer relationship • Increase their strengths and focus on development needs with regard to the *4 Cores of Credibility* • Build a "walled city" around their accounts by evaluating the competitive landscape • Create a competitive strategy and plan actions to maximize strengths and minimize weaknesses • Create value for their customers by identifying issues, evidence of those issues and the impact they have on an account • Assess their core account teams and determine if the right people are doing the right things at the right time • Establish communication strategies to ensure their contributions get noticed • Create a cadence of accountability to foster ongoing communication and collaboration externally with their key customers and internally with their account teams
SUSTAIN YOUR ACCOUNT	• Examine the daily whirlwind of tasks that keep them from advancing their strategic goals • Evaluate how and where they typically spend their time and make a plan to reset their focus if necessary • Carve out time to schedule the "Big Rocks" – long-term projects that make all the difference
THE WAY FORWARD	• Use the Playbook System to develop and grow account management expertise

12-WEEK IMPLEMENTATION PLAYBOOK



- Each week for 12 weeks, account managers will work on playbook activities that support and sustain what they learned in the live work session. The playbook phase is the key to the implementation of this new approach to key account planning and execution.
- Account managers hold themselves accountable through regularly scheduled check-ins with their leaders and coaching sessions with their team members.

For more information about FranklinCovey's *Account Planning & Execution,* contact your client partner or call 1-888-705-1776.

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