# Strategic Account Planning: Maximizing Key Client Relationships

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UK Traininig
PARTNER



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## Why This Course

Major accounts often represent a significant portion of organizational revenue, growth potential, and long-term business stability. Managing these accounts successfully requires more than regular follow-up and relationship maintenance. It requires a structured approach to understanding client priorities, identifying growth opportunities, building influence, and protecting the account from competitive pressure.

Strategic account managers must be able to think beyond short-term sales. They need to understand the client's business, map decision-making structures, align solutions with strategic priorities, and position themselves as trusted advisors who create measurable value.

This intensive 1-week course equips account managers with a repeatable methodology for winning more business from strategic accounts while strengthening client relationships. Through practical frameworks, account analysis tools, opportunity planning, and real-world application, participants will learn how to develop effective account plans, expand share of wallet, defend against competitors, and drive sustainable revenue growth.

## What You'll Learn and Practice

By joining this program, you will:

- Develop a repeatable methodology for strategic account planning and management.
- Select, prioritize, and evaluate strategic accounts based on growth potential.
- Analyze account dynamics, decision-making structures, and stakeholder influence.
- Identify high-value sales opportunities within major accounts.
- Conduct SWOT, white space, relationship, and competitive analyses.
- Align solutions with the client's strategic priorities and business drivers.
- Build actionable plans to expand share of wallet and deepen relationships.
- Apply strategies to protect key accounts from competitive threats.
- Improve resource allocation and internal team alignment.
- Strengthen your role from vendor to trusted strategic advisor.



## The Program Flow

### Day 1: Foundations of Major Account Planning

- Understanding the value and importance of strategic account management.
- Strategic account selection and prioritization criteria.
- The account planning process and its role in revenue growth.
- Analyzing account potential and setting realistic growth targets.
- Mapping the client's organization, stakeholders, and decision-making structure.
- Identifying buying centers, influencers, sponsors, and decision makers.
- Practical exercise: Building an account profile and stakeholder map.

### Day 2: Deep Account Analysis

- Conducting a comprehensive account SWOT analysis.
- Identifying the client's key business drivers, challenges, and initiatives.
- Assessing relationship strength across different levels of the account.
- Understanding political, commercial, and operational dynamics inside the account.
- Competitive positioning and differentiation strategies.
- Recognizing risks, gaps, and threats to account growth.
- Workshop: Completing a deep account analysis for a selected key account.

### Day 3: Opportunity Identification and Prioritization

- White space analysis techniques for uncovering growth areas.
- Identifying cross-sell, upsell, renewal, and expansion opportunities.
- Aligning solutions with the client's strategic priorities.
- Opportunity qualification and prioritization frameworks.
- Building a robust opportunity pipeline within major accounts.
- Evaluating opportunity value, timing, probability, and strategic fit.
- Practical exercise: Creating an opportunity map and prioritized pipeline.

### Day 4: Strategic Account Plan Development

- Setting account-level objectives, strategies, and success measures.
- Creating action plans for top opportunities.
- Planning relationship expansion and influence-building activities.
- Resource allocation and internal alignment across sales, technical, service, and leadership teams.
- Developing strategies to protect the account from competitive encroachment.
- Building account engagement plans and executive sponsorship approaches.
- Workshop: Developing a strategic account plan for a key account.



### Day 5: Plan Execution and Management

- Turning account strategy into disciplined execution.
- Implementing governance, cadence, and review processes.
- Measuring and reporting on account plan progress.
- Tracking revenue growth, relationship strength, opportunity movement, and risk indicators.
- Adapting plans to changing client priorities and competitive dynamics.
- Elevating your role to trusted advisor status.
- Final activity: Presenting your strategic account plan and execution roadmap.

## Individual Impact

- Strengthen your ability to manage strategic accounts with structure and confidence.
- Improve your account analysis, opportunity identification, and planning skills.
- Build stronger client relationships at multiple levels.
- Enhance your ability to position solutions around client priorities.
- Improve confidence in defending accounts against competitive threats.
- Develop the mindset and tools needed to become a trusted strategic advisor.

## Work Impact

- Increase revenue growth and profitability from major accounts.
- Improve share of wallet through structured opportunity identification.
- Strengthen account retention and reduce competitive vulnerability.
- Improve internal alignment around account objectives and client needs.
- Build more consistent and repeatable account planning practices.
- Enhance long-term client value, loyalty, and strategic partnership potential.

## Training Methodology

This program uses a highly practical and sales-focused approach. Participants will work on real or selected strategic accounts throughout the course and progressively build a complete account plan. Learning methods include:

- Interactive discussions and guided facilitation.
- Strategic account planning case studies.
- Account profiling and stakeholder mapping exercises.
- SWOT, white space, and competitive analysis workshops.
- Opportunity qualification and prioritization activities.
- Group work, peer review, and facilitator feedback.
- Practical templates, checklists, and account planning tools.



## Beyond the Course

Upon completion, participants will be ready to manage major accounts with a more strategic, structured, and growth-focused approach. They will return prepared to:

- Develop a completed strategic plan for a key account in their portfolio.
- Use account planning templates and frameworks in daily account management.
- Identify and prioritize growth opportunities within major accounts.
- Protect strategic accounts from competitive threats.
- Align internal resources around account objectives.
- Position themselves as trusted strategic partners who create measurable client value.

