Strategic Account Planning: Maximizing Key Client Relationships

27 June – 1 July 2027
Online



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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.

