

Know the Numbers

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- Which numbers (metrics) facilitate co-understanding across the team?
- KAM Best Practices enabled and supported by the numbers
- Engaging the account in number co-development and interpretation

Dennis J. Chapman Sr.

CEO/President, The Chapman Group

- Dennis Chapman is a talented and seasoned executive with over 40 years of sales and account management experience.
- Dennis brings a wealth of expertise in the areas of prospect/pipeline management, sales coaching and leadership, customer loyalty/commitment assessments and strategic account management (process, practices, methodologies, skills, and tools/metrics).
- His metric-based, collaborative approach to working with clients has enabled organizations to experience significant and sustainable revenue results in the form of client retention, acquisition and growth.



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We Live in a Numeric World - *We Measure Everything*

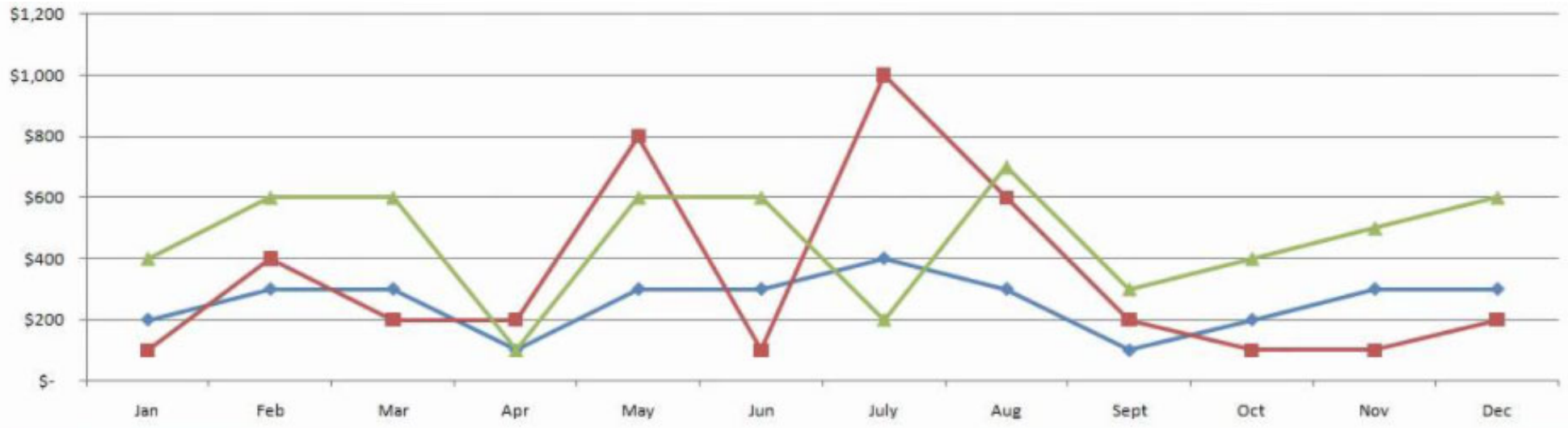


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**What gets measured,
gets improved.**

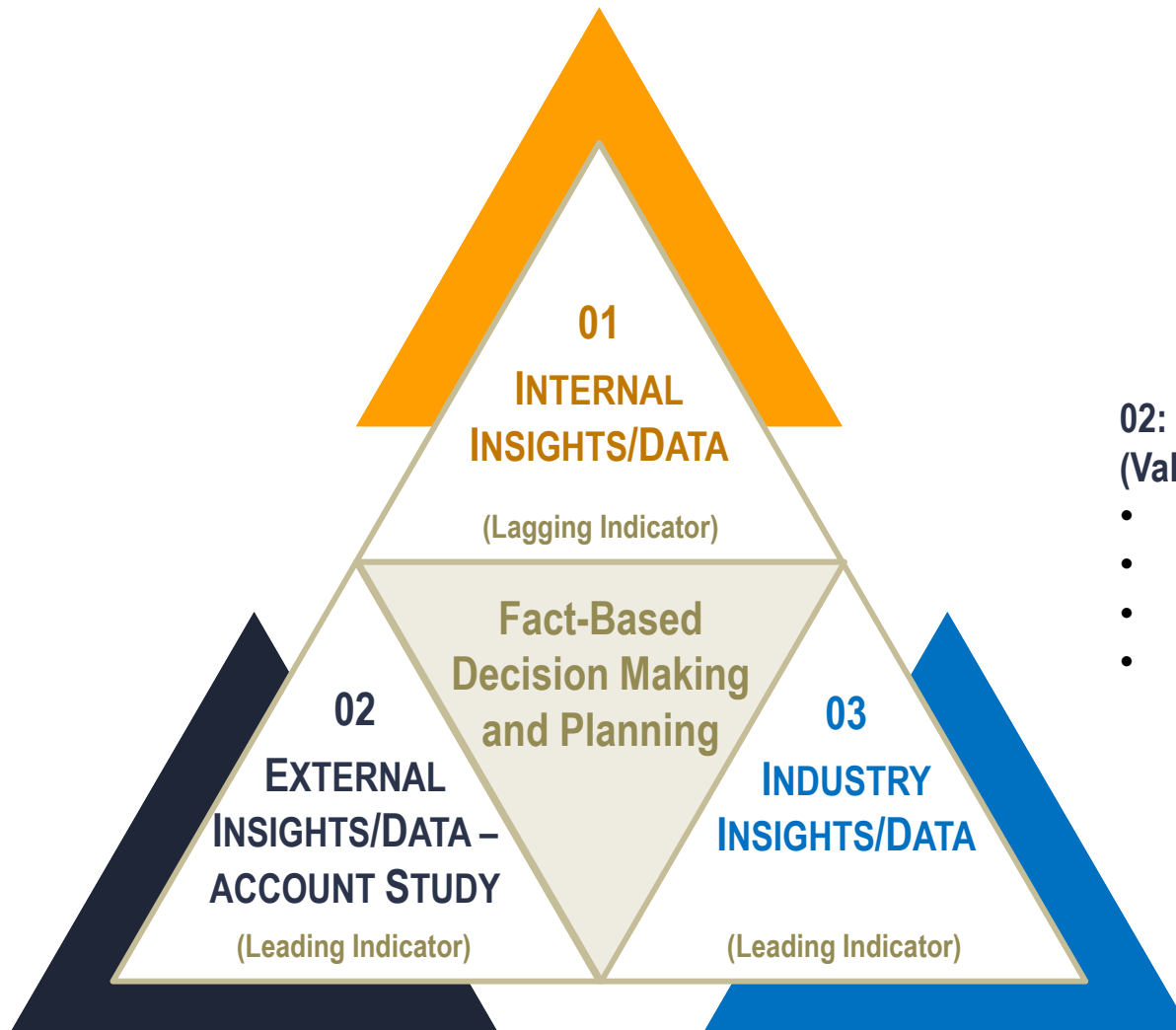
- Peter Drucker

We Quantify to Improve and Succeed



Triangulation

Utilizing Numbers (Facts) to Guide and Validate the Right (Most Impactful) Decisions



01: INTERNAL INSIGHTS/DATA (Ongoing)

- Financial reporting/ROI Analysis
- Services/support detail
- Team experiences (Client meetings)
- Employee engagement

02: EXTERNAL INSIGHTS/DATA – ACCOUNT STUDY (Validation/Uncover Facts of Relationship)

- Account experiences
- Priorities/challenges/relationship insights
- Hidden trends/themes (future and present)
- Value perception (Team/Solutions)

03: INDUSTRY INSIGHTS/DATA

- Market analysis/trends
- Competitive analysis
- Industry growth rates
- Expert resources/consultation including thought leadership

Account Relationship Management 2022+

Improvement / Success Requires Focus

- New/right numbers (metrics)
 - Fresh data to drive decision making at the Organization and Account level
 - Analytics that influence predictive modeling

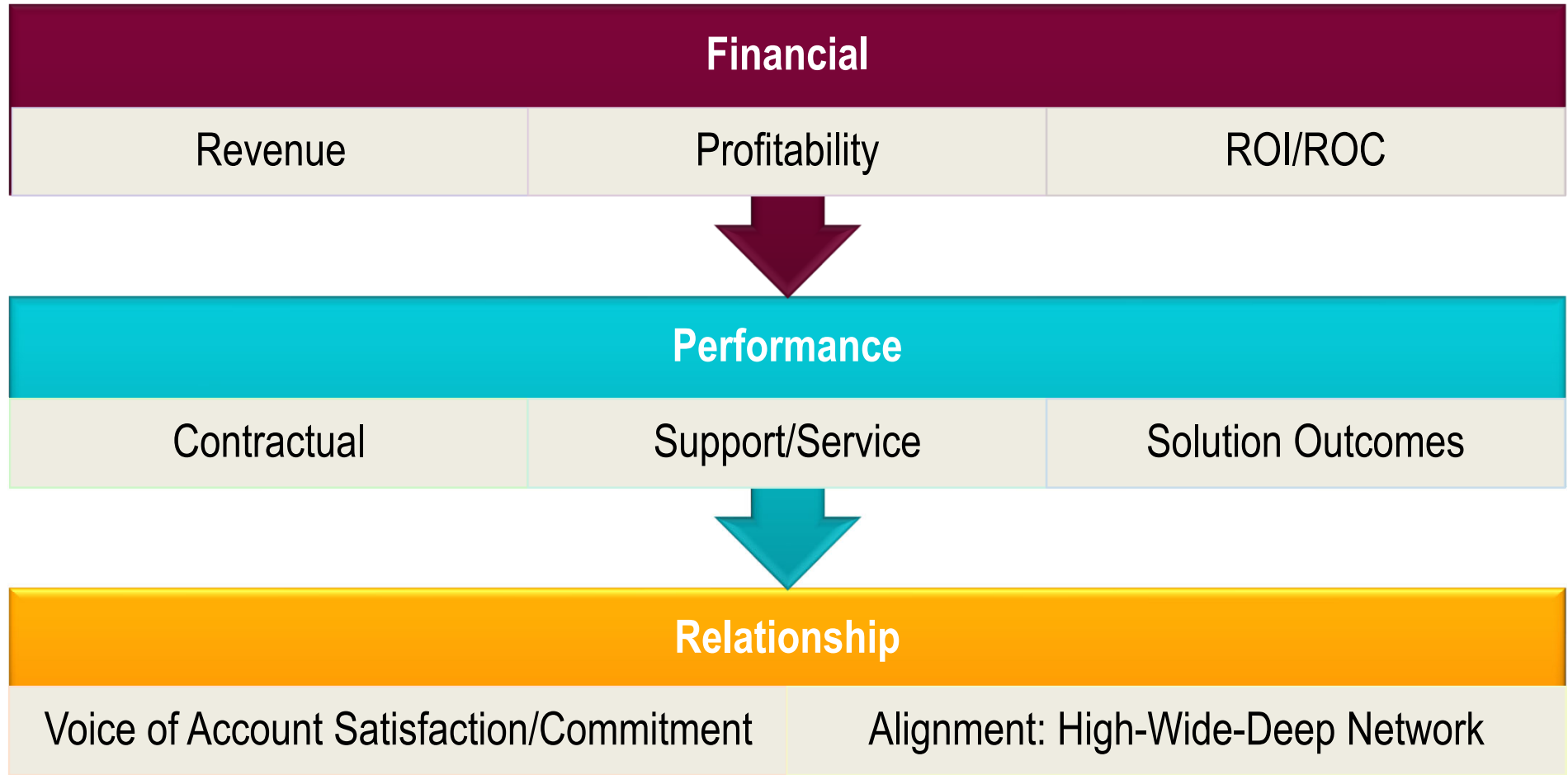
Relationship Guidance System



***Which Numbers Really
Drive the Relationship?***

The Relationship Guidance System

Numbers that facilitate fact-based mutual understanding



KAM Practices that Optimize the Value of the Numbers

1

Collaborative Action Planning (CAP)

Facts driving ongoing conversations, alignment and focus at the Strategy Table



2

Strategic Account Planning – Team/Advisory Board



3

High, Wide, Deep Relationship Management

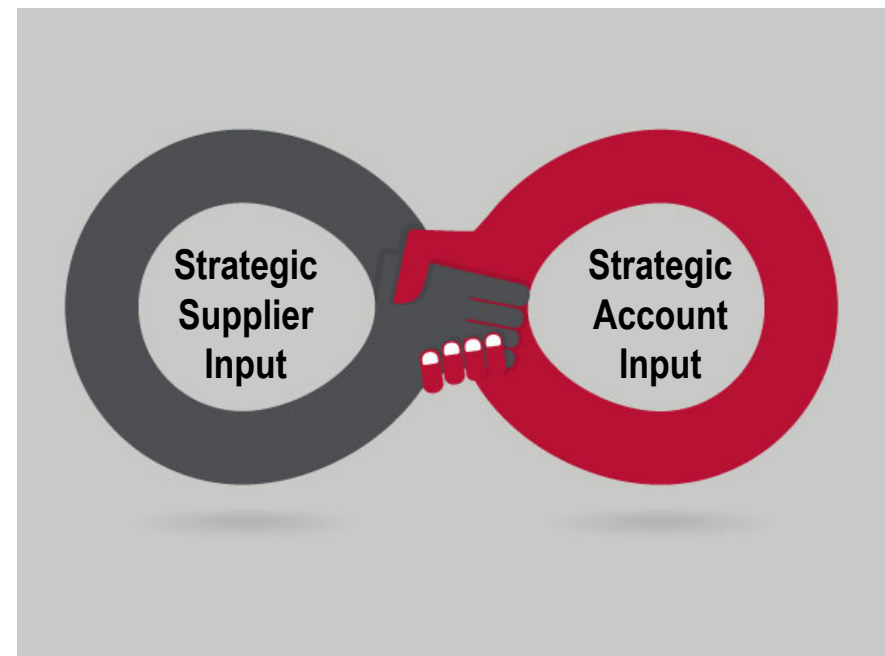


KAM Practices that Optimize the Value of the Numbers

4

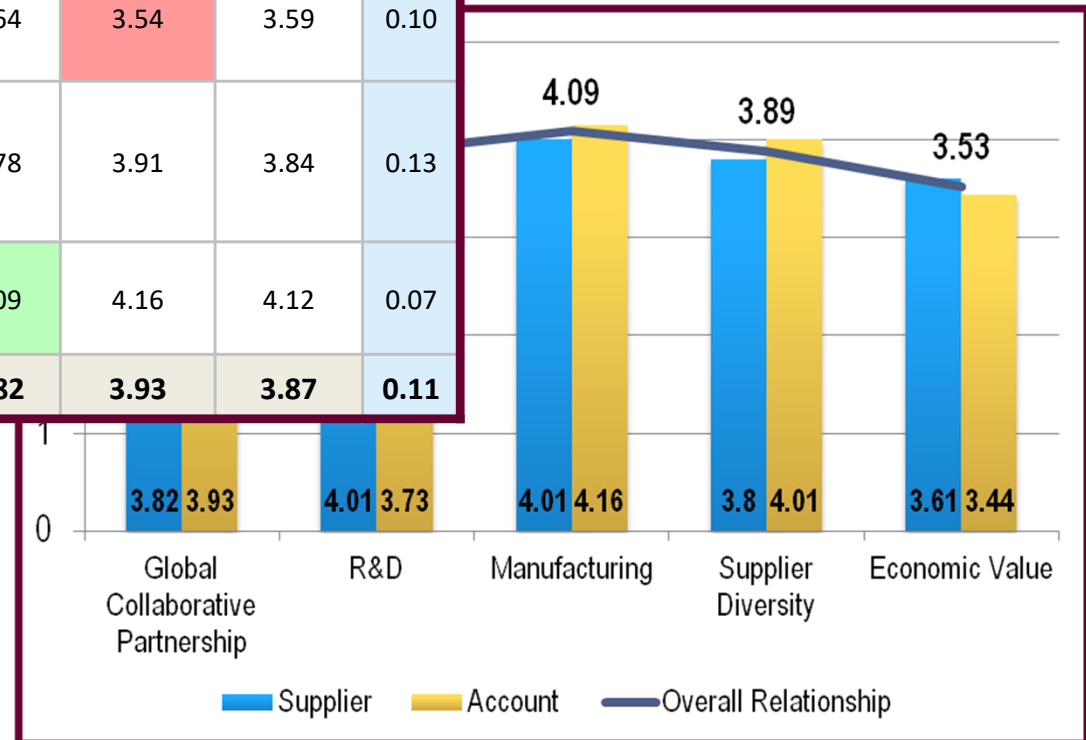
The Joint Scorecard – Co-development / Assessment of the Numbers

- A Relationship Planning and Management approach where both Account/Strategic Supplier provide agreed to feedback (insights)
- A process that focuses on mutually agreed to Key Performance Indicators that influence existing business strategies/vision (success)
- Practices where insights are compared and influence actions that move relationships to or sustain relationships at the highest mutually beneficial state
- An initiative that identifies and delivers previously unidentified opportunities for positive and tangible outcomes – including financial gains!



Sample Joint Scorecard

Element	By Supplier	By Account	Overall Avg.	Δ
1.10 Overall Transparency [Account Supplier] enables transparent collaboration through the sharing of strategic information including but not limited to global growth plans, STRAPs and AOPs.	3.54	4.23	3.86	0.68
1.11 Collaborative Action Planning [Account Supplier] works with our team in a systematic manner to develop and review on an annual/semi-annual basis, mutually agreed to goals and objectives (with action items and success metrics) of this partnership and/or a specific project effort.	3.92	4.00	3.96	0.08
1.12 Senior Leadership Involvement The Senior Leadership team of [Account Supplier] is available as required and participates in critical partnership meetings including Strategic Business Reviews.	4.07	4.25	4.17	0.18
1.13 Invoicing Supplier submits accurate invoices in accordance with our organization's submission guidelines./Account processes invoices in an accurate and timely manner.	3.64	3.54	3.59	0.10
1.14 Ease of Doing Business Overall, [Account Supplier] is simple to work with on both tactical and strategic efforts (i.e., provides access to resources, effectively addresses and resolves concerns/problems, and is collaborative, proactive, and receptive to suggestions for improvement).	3.78	3.91	3.84	0.13
1.15 Risk/Reward Sharing Overall, [Account Supplier] has a desire for fairness for the other party over the lifetime of the relationship.	4.09	4.16	4.12	0.07
OVERALL	3.82	3.93	3.87	0.11



Key Learning Points – Know the Numbers

- Organizations/Accounts Team need to be guided by “the numbers”
- Numbers need to be an integral part of the Relationship Plan
- Numbers are most valuable when analyzed and validated by the Account
- There needs to be an analyst role connected to all Account Teams
- Keep the Dashboard simple – focus on drivers of relationship

Thank You!

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