



The Association for
Key Account Management

Diploma competency workbook

1



Business and customer understanding

Name:

Organisation:

Date:



1.1 Knowledge of own company

Supporting items of evidence submitted (if applicable):

Infrastructure, organisation and people

- Demonstrates understanding of the full extent of their own business, its divisions and locations.
- Recognises the activity of each division/location and how they can and could work together.
- Understands how the formal organisation of their own company affects its decisions and operation.
- Understands how individuals in the company are organised, e.g. who has budget responsibility and participates in decision-making, their specific concerns and expectations, and works with them accordingly.
- Records which are the principal influencers and most powerful individuals in their organisation.
- Responds to the needs of different departments, e.g. Operations, Finance, Customer Service, to secure decisions and actions for the customer.

Systems and processes

- Demonstrates understanding of their own organisation's value chain(s) and identifies other key organisations involved in the chain.
- Articulates their organisation's current and potential capabilities, noting significant limitations.
- Appreciates the guiding principles of the organisation's systems and processes e.g. safety, speed, low cost.
- Can explain how the organisation makes different decisions.

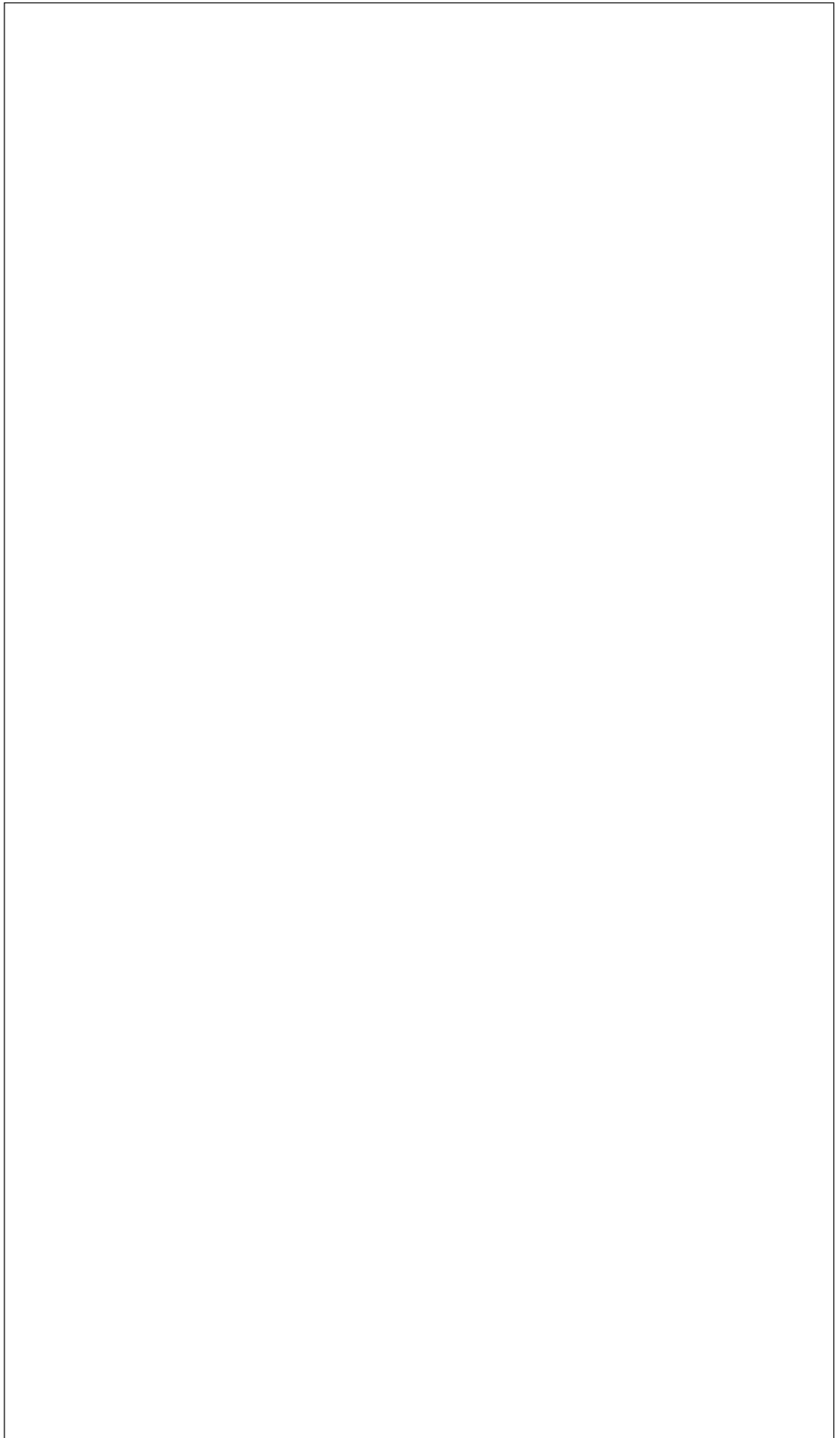
- Fully understands, works with and complies with sales and account management processes.
- Recognises the impact of their own organisation's systems and processes on the customer.

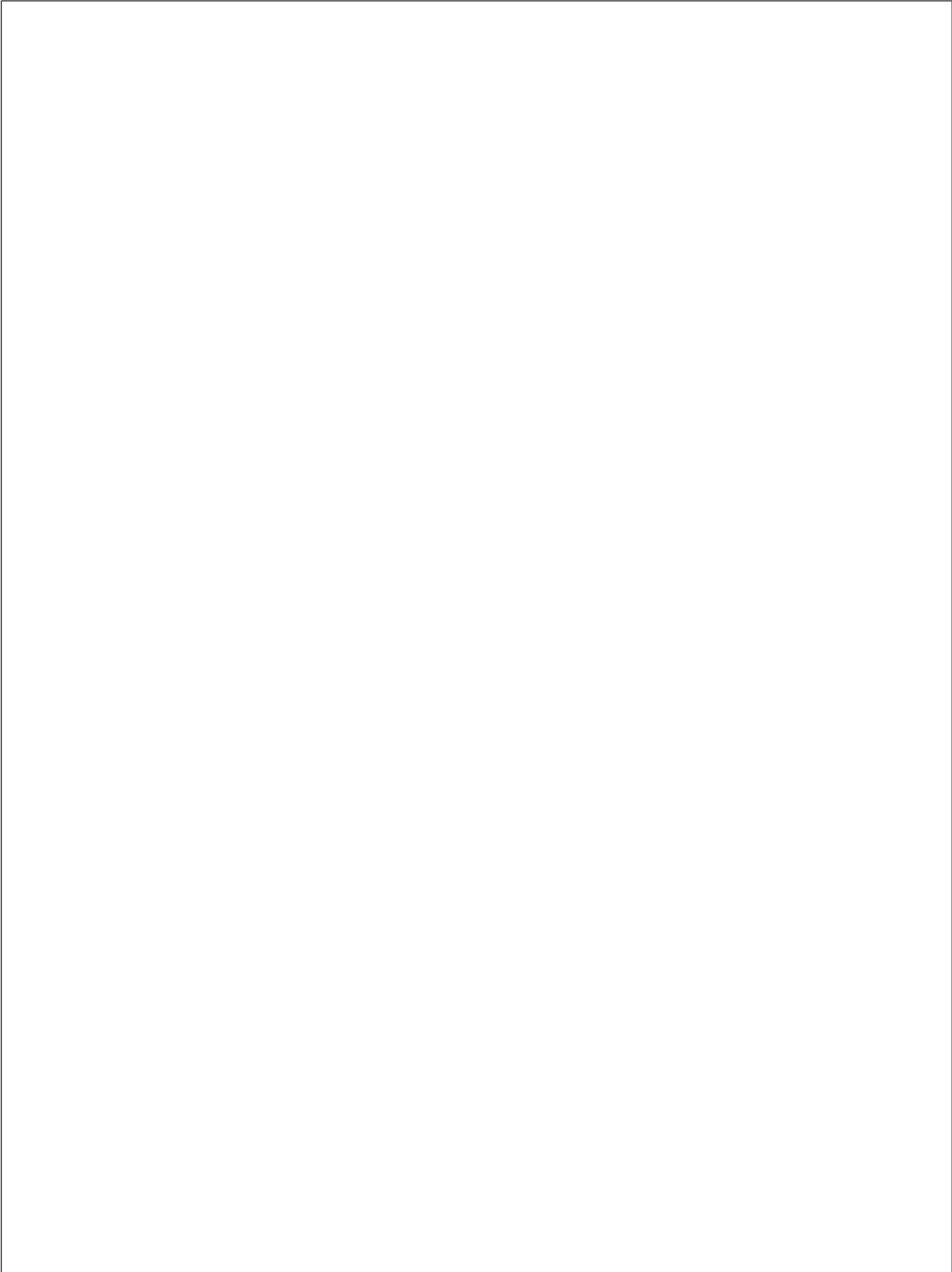
Company's strategy

- Understands and articulates their organisation's strategy.
- Understands and follows their own organisation's stated values and ethics.
- Appreciates how the strategy impacts on company decisions and actions.
- Understands, demonstrates and articulates the organisation's sales and marketing strategies, particularly in relation to key customers.
- Aligns offers to customers with the organisation strategy.
- Contributes appropriately in strategy development as required.

Their own organisation's marketplace

- Identifies and defines the marketplace(s) in which their organisation participates.
- Understands the ranking and role of the organisation in each value chain and marketplace, e.g. producer, distributor, retailers.
- Understands the position and overall offer of the organisation's key competitors.
- Collects and interprets information on trends, issues and pressures in their organisation's marketplaces.
- Interprets this information to develop an understanding of their own organisation's position in its business environment.





1.2 Customer organisation

Supporting items of evidence submitted (if applicable):

Customer's infrastructure, organisation and people

- Demonstrates understanding of the full extent of the customer and its various locations.
- Appreciates the activity of each location and how they work together.
- Recognises how the customer makes different decisions and how the formal organisation affects decision-making.
- Acquires customer organogram and builds and keeps up-to-date a database of contact details of relevant people in the customer organisation.
- Collects and keeps job-related details of individuals, such as budget responsibility, participation in decision-making, specific concerns and expectations etc.
- Recognises the principal influencers and most powerful individuals in the customer.
- Demonstrates knowledge of the decision-making unit and appreciates how to address its different members.

Systems and processes

- Demonstrates an understanding of the customer's value chain(s).
- Appreciates the guiding principles of the customer's systems and processes, e.g. safety, speed, low cost, and their implications.
- Understands the impact of the customer's systems and processes on interaction with the supplier.

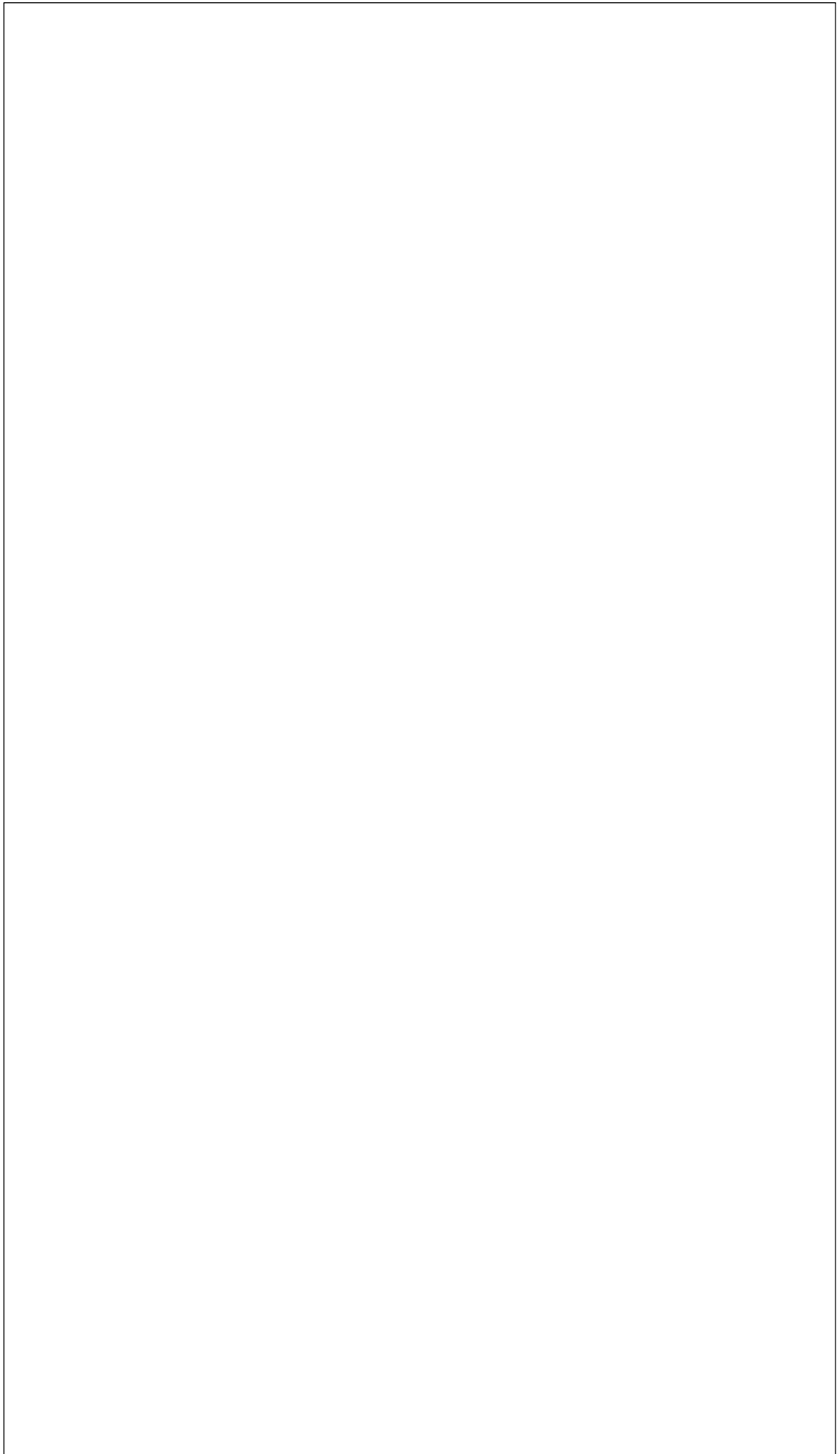
- Ensures their organisation's compliance with the customer's systems and processes.
- Acquires and absorbs customer literature, especially the Annual Report.

Customer's strategy and product/service offering

- Understands and articulates customer's strategy and how it impacts decisions.
- Understands the customer's key values and ethics and acts in ways consistent with them.
- Aware of the customer's complete range offered to its own customers. (i.e. their customer's customer)
- Demonstrates an understanding of the part of the customer's range or activity that is relevant to their organisation and the importance of that part to the customer.
- Recognises the customer's overall brand values and aligns offers with them.
- Understands and articulates the customer's specific value proposition and actual performance of each product/activity that is relevant to their organisation.

Customers's marketplace

- Identifies the marketplace(s) in which the customer operates.
- Identifies and understands the nature of the customer's customer segments.
- Understands the ranking and role of the customer in each marketplace relevant to the supplier.
- Collects information from the customer on trends, issues and pressures in relevant marketplaces.
- Understands the position and overall offer of the customer's key competitors.
- Interprets market information to understand the customer's position in its business environment.



1.3 Value creation

Supporting items of evidence submitted (if applicable):

Expectations and opportunities for value creation

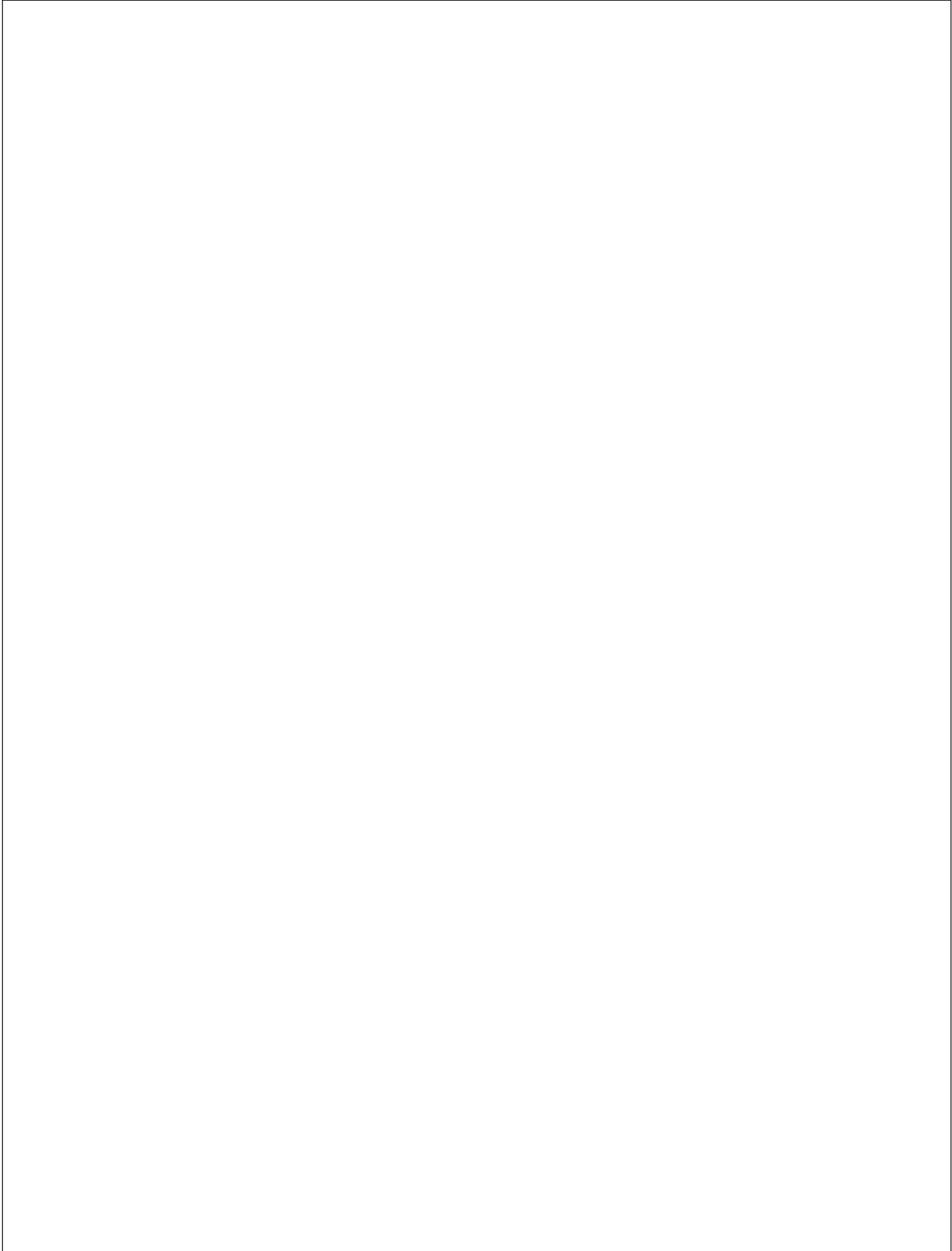
- Collects information from a range of sources in own organisation, the customer and external e.g. sector sources.
- Displays curiosity and inquisitiveness in an appropriate way and asks justifiable, coherent and answerable questions.
- Keeps information in a well-ordered and retrievable form.
- Populates established business analysis tools and frameworks with collected information, analyses and interprets data, draws meaningful conclusions.
- Identifies key addressable issues and critical relevant capabilities on both sides.

Process of value creation

- Identifies people involved in value creation process.
- Manages value creation process, including group workshops for the formulation of clear statements of value propositions.
- Gains approval and commitment to value proposition from own company and key account.
- Oversees value development project progress and delivery.

Measuring and monitoring value delivered

- Quantifies potential supplier benefit and customer benefit.
- Tracks delivery of agreed value by own organization.
- Sets up system to measure customer take-up and outcomes.
- Monitors actual value delivery, reports back versus expectations and takes corrective action.



1.4 Strategic planning for key accounts

Supporting items of evidence submitted (if applicable):

Preparing to plan

- Demonstrates understanding of the necessary scope and structure for the plan and the information needed to complete it.
- Maintains information on who holds what data in both the customer and own organisation.
- Collects, analyses and interprets information from a wide range of sources and creates relevant and doable value propositions.
- Identifies appropriate individuals to work with in developing the plan in own organisation and the customer where possible.
- Makes those involved aware of the plan production process, identifies and provides 'training' where necessary.

Production of plan

- Manages a process of tasks and workshops with identified participants to agree broad analysis, value added, principles and targets in the plan.
- Writes a well-organised, complete, readily comprehensible, realistically ambitious, succinct but self-explanatory plan covering at least the next 3 years, including a brief but comprehensive executive summary and realistic and full action plan for minimum 1 year.
- Identifies the resources required to fulfil the plan in terms of nature, source, quantity, cost and timing.
- Includes metrics and targets in the plan to assess progress on specific strategies.

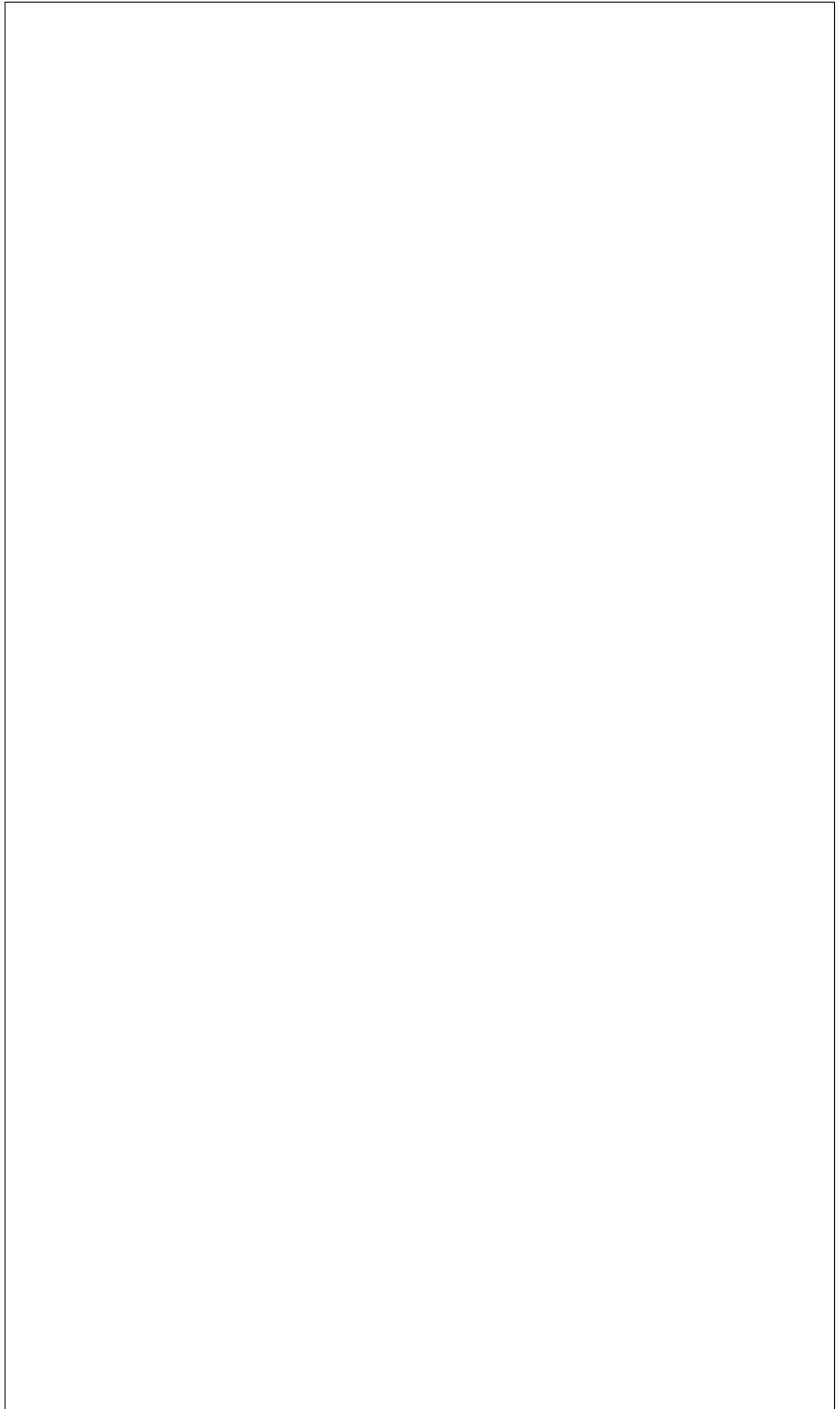
- Shares the draft plan with key individuals, accepts critiques and makes adjustments accordingly.
- Develops plan communication schedule and meets plan submission deadlines.

Resource acquisition

- Develops appropriate presentations for key internal stakeholders, anticipates and manages reactions.
- Adapts requirements to the agendas, needs and constraints of other functions, demonstrates an understanding of their processes and complies with them.
- Seeks and gains formal approval for the key account plan, including from providers of required resource.
- Creates additional business cases to justify use of further resources where needed.
- Delivers tailored, effective presentations to key customer stakeholders and gains commitment to supply necessary resources from resource 'owners' in the customer.

Alignment of action to plan

- Provides clear and timely briefings to people working with the customer or on their behalf and facilitates relationships between complementary supplier and customer functions.
- Actively uses the plan as a blueprint for action and checks the relevance of activity.
- Completes action to schedule and ensures that others do too.



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- Completes action to schedule and ensures that others do too.
- Builds a set of metrics to monitor input into the account and outcomes resulting from the input.
- Monitors analyses, action and results and responds: takes timely action to poor metrics and learns from delays and shortfalls.
- Reviews plan progress with colleagues and customer regularly.