

KAM: Account Planning, Negotiation & CRM

Learn to plan, negotiate and manage key accounts using CRM systems, performance metrics and account growth strategies.

3 Days

DURATION

15

MODULES

43

TOPICS

COURSE OVERVIEW

This course covers the fundamentals of key account management, including identifying and segmenting key accounts, building customer relationships through CRM systems, and applying customer-centric and value-based selling techniques. It then moves into strategic account planning, cross-functional collaboration, negotiation skills and risk management for key accounts. The final part addresses performance measurement, account growth strategies, leadership and influence with stakeholders, and continuous improvement of key account management practices.

WHO THIS COURSE IS FOR

Key Account Managers

Sales Managers

CRM Administrators

Business Development Managers

Account Executives

LEARNING OBJECTIVES

- Explain the role and importance of key account management
- Identify criteria for selecting and segmenting key accounts
- Apply CRM systems and data to build customer relationships
- Develop strategic account plans with SMART objectives
- Apply win-win negotiation techniques to key accounts
- Assess and mitigate risks affecting key accounts
- Analyse performance metrics to drive account growth
- Evaluate leadership approaches for influencing stakeholders

15 Modules, 43 Topics

DAY 1 Understanding Key Account Management

01

Introduction to Key Account Management (KAM)

TOPICS

- Definition and Importance of KAM
- Differences Between Key Account Management and Regular Sales
- The Role of a Key Account Manager

02

Identifying Key Accounts

TOPICS

Criteria for Selecting Key Accounts · Analyzing Account Potential and Profitability · Tools and Techniques for Account Segmentation

03

Customer Relationship Management (CRM)

TOPICS

- Building and Maintaining Strong Customer Relationships
- The Role of CRM Systems in KAM
- Leveraging Data for Account Insights

04

Customer-Centric Selling

TOPICS

- Understanding Customer Needs and Expectations
- Techniques for Tailoring Solutions to Key Accounts
- Value-Based Selling Approaches

05

Case Study & Group Discussion

TOPICS

- Real-Life Examples of Successful Key Account Management
- Group Analysis and Presentation of Case Study Findings

DAY 2

Strategic Planning and Account Development

01

Account Planning and Strategy Development

TOPICS

Developing a Strategic Account Plan · Setting SMART Objectives for Key Accounts · Long-Term vs. Short-Term Account Strategies

02

Cross-Functional Collaboration

TOPICS

- Working with Internal Teams for Account Success
- The Role of Marketing, Finance, and Operations in KAM
- Effective Communication and Collaboration Techniques

03

Negotiation Skills

TOPICS

- Principles of Successful Negotiation in KAM
- Techniques for Win-Win Negotiations
- Handling Difficult Conversations and Objections

04

Managing Key Account Risks

TOPICS

- Identifying and Mitigating Risks in Key Accounts
- Contingency Planning and Crisis Management
- Building Resilience in Account Management

05

Role-Playing Exercise

TOPICS

- Simulated Negotiation Scenarios with Key Accounts
- Feedback and Improvement Strategies

DAY 3 Performance Optimization and Growth

01

Performance Metrics and KPIs

TOPICS

- Identifying Key Performance Indicators for KAM
- Tracking and Measuring Account Performance
- Using Analytics to Drive Account Growth

02

Driving Account Growth

TOPICS

- Strategies for Expanding Relationships with Key Accounts
- Upselling, Cross-Selling, and Customer Retention Techniques
- Innovation and Value-Addition for Key Accounts

03

Leadership and Influence in KAM

TOPICS

- Leading Key Account Teams
- Influencing Stakeholders and Decision-Makers
- Building Trust and Credibility with Key Accounts

04

Continuous Improvement in KAM

TOPICS

- Learning from Account Feedback and Market Trends
- Implementing Continuous Improvement Processes
- Adapting to Changing Customer Needs

05

Final Assessment & Action Plan

TOPICS

- Review of Key Learnings from the Training
- Developing an Individual Action Plan for Participants
- Group Discussion and Feedback Session

WHAT IS INCLUDED

Everything You Need to Succeed

- Koenig course material for every module
- Hands-on exercises throughout the course
- Delivery by certified instructors and subject matter experts
- Course completion certificate from Koenig

Who We Are

Established in 1993, Koenig Solutions is a globally recognised training provider with 35+ technology partnerships, 5,000+ training programmes and a network of certified instructors and subject matter experts, supporting individuals and enterprise teams worldwide.

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Live Online Classes (ILO)

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