

Adding Value with Top Account Planning

Growing top accounts is often an important focus area for organizations. But we can get busy “doing the work” for our clients and we don’t stop and reflect on how we can serve them better. Developing and implementing a top account planning process has been shown to not only enhance the value you provide to your clients, but also fuel growth for your organization.

First, it’s important to identify which of your clients you want to create plans for. Start with the top few that you believe are critical to the success of your organization.

In order to create the plan, you need to review your impact in the last period and identify opportunities for the next period.

1. For each client, answer these questions:
 - a. What did you set out to accomplish together?
 - b. What were your biggest accomplishments?
 - c. What worked well?
 - d. What didn’t work well?
2. Document the answers
 - a. Try to keep it to 1-2 pages.
 - b. You can add more details, but to start, you want to focus on the main points.
3. Set time to meet with your client and go through the responses together.
4. Ask for and gain your client’s feedback on the questions.
5. Together, answer the following questions:
 1. What are the top 3-5 priorities for the next period?
 2. What is our action plan to implement the priorities (what, when, and who is responsible)?
6. Document the priorities and action plan and send them to your client for confirmation.
7. Execute the action plan and track results throughout the next period.
8. “Rinse & repeat” - Conduct the process again after the next period.

Put it in Action

1. Determine the top accounts you will use this process with.
2. Choose one of the top accounts to pilot the process.
3. Follow steps 1-7.
4. Once completed, review the process and answer these questions:
 - a. What worked well in the process?
 - b. What didn’t work well in the process?
 - c. How should we enhance the process?
5. Document the enhanced process.
6. Follow the process with your other top accounts.
7. Continue to review the process and enhance it as necessary.

About CMO-OnLoan

With CMO-OnLoan you gain marketing experts who:

- Are trusted and valued members of your team
- Provide expertise to help grow your business
- Have an entrepreneurial and problem-solving spirit
- Provide leadership from planning through execution
- Can connect you to a network of trusted, expert resources

We’re Here to Help!

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