

## Development & Learning topic: *Account Management (Farming)*

Some organisations call it account management, some call it selling to existing customers, some call it customer retention... at The Next Level we bundle all these terms under the name "farming": preserving current and developing new revenue streams from existing customers.

Many organisations struggle to balance the science of account management structure, process and systems with the art of individual creativity and freedom. This workshop will address the imbalance and arm your salesforce with all they need to get the most out of their existing customer base.

### How do we do it?

Our Development & Learning topics provide the structure and methodologies, while your sales leaders put them into practice using real data – and reap rewards in the form of tangible processes, models and tools.

The Account Management (Farming) topic can be customised to meet your specific needs, whether it be:

- a 1-2 hr presentation (eg at company sales conference) that will challenge the team's conventional sales beliefs
- a half-day workshop developing the theme, or
- a whole day boot camp utilising your data to design and develop your account management toolkit

LEVEL	SECTION TOPICS	KEY ACTIONS AND OUTPUTS
3	Value roles - the basis of the visit program	<ul style="list-style-type: none"> <li>• Recognise that converting sales relationships to business partnerships requires a company-wide sales system</li> <li>• Define the specific partner value roles (inventory partner, loyalty partner and value add partner) to be programmed to a customer's visit schedule using The Next Level's universally applicable framework.</li> </ul>
3	Account Plan	Understand effective account planning, the lesser known concepts of visit types and partnership plans and calendars <ul style="list-style-type: none"> <li>• Define visit types, both to customers in your value chain segment and brokerage visits to parties in different value chain segments</li> <li>• Learn the skills to effectively plan, undertake and evaluate all visit types</li> <li>• Construct templates for Account Plan, Partnership Plan &amp; Partnership Calendar</li> <li>• First cut supporting software/CRM specification</li> </ul>
3	Visit Types	
3	Partnership Plan	
3	Partnership Calendar	

### What do you need to do?

- Select your preferred format (presentation, workshop or boot camp)
- Select the most appropriate 6-15 delegates from your sales and marketing management group to participate
- Assist us with an hour or two here and there during the month beforehand to gather specific data or inputs we will require to prepare the customisation

### What do you get?

- Our presentations motivate participants to take a fresh look at your company's sales territories and identify opportunities for improvement
- Our workshops extend this by also increasing the skill and knowledge base of participants in the above areas
- Our boot camps provide all of this PLUS participants will leave with a Hunting plan and toolkit, with user guides, that you can implement immediately and/or continue to develop back at your offices