



Best Practices #6

Manage your Key Accounts with a 360-approach



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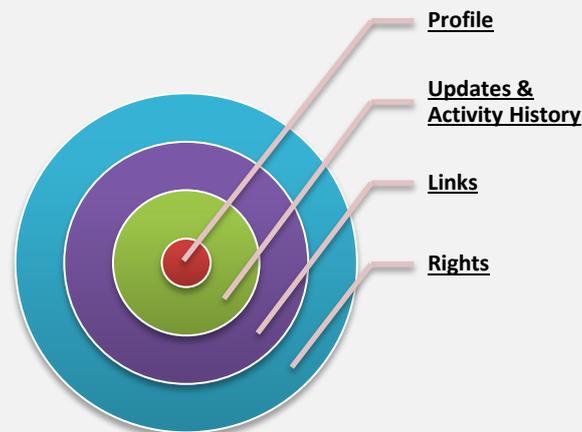
Manage your Key Accounts with a 360-approach

According to Wikipedia¹, sales from a company's key accounts have increased from 23% in 1975 to 60% currently. Even if this increase is exaggerated, still it illustrates the importance of maintaining “special relationships” with few strategic - therefore “key” - customers.

Key Account Management (KAM) is not affecting only the Sales Department; it requires a broader organizational change. If a Key Account (KA) is promised priority access to urgent products or services, it is Operations who can provide that, not Sales. So, KAM is not only about “special customer care” by Sales, but also “special internal operations” throughout various related Departments. Let's see how Comidor uses a 360-approach to handle KAM.

A

KA Levels:



- Profile: All the general information regarding the KA, such as company logo, sector, category, (company, shipping and billing) address, website, email, social media accounts and geo-location (integrated Google Maps).
- Updates & Activity History: Add notes which describe the latest KA status updates (i.e. the results from a customer visit, a videoconference meeting minutes, a message to your holiday-substitute) or simply go through the detailed activity history to refresh your memory on older activities.
- Links: Associate your KA with various Comidor units so that you make KA the core of a complete set of information (from projects to documents, from opportunities to tasks and many many more)!

¹ http://en.wikipedia.org/wiki/Account_manager#cite_note-3

B

KA Links

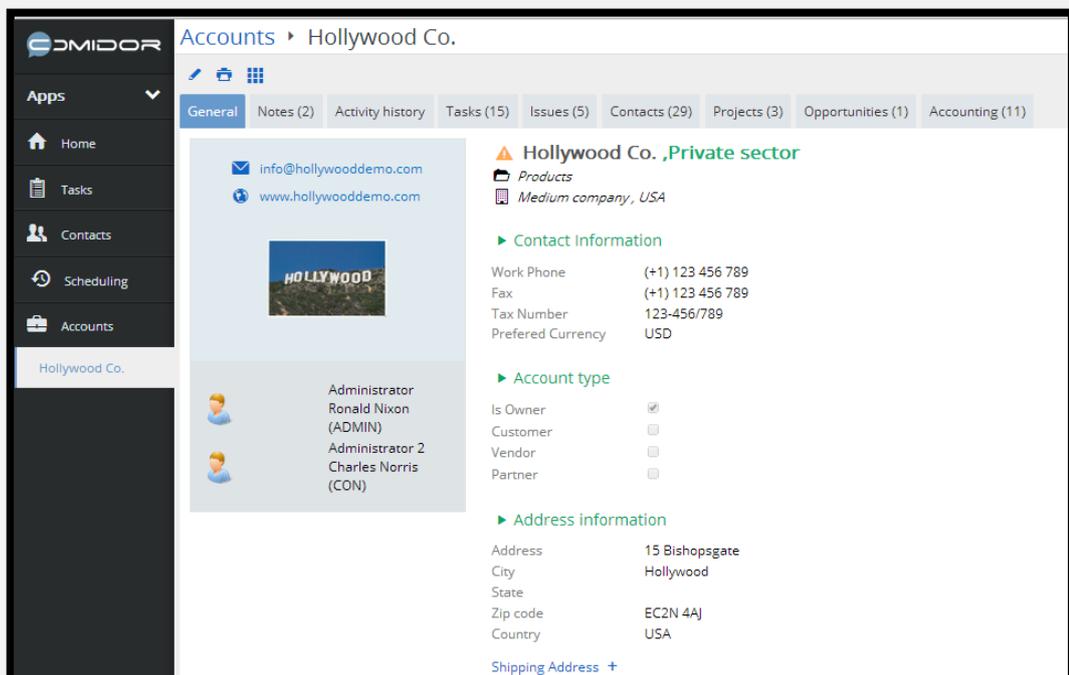


- Rights: Define the key account managers (administrators) and set Access and Change Rights based on your Organogram (i.e. include Operations Department into Access Rights).

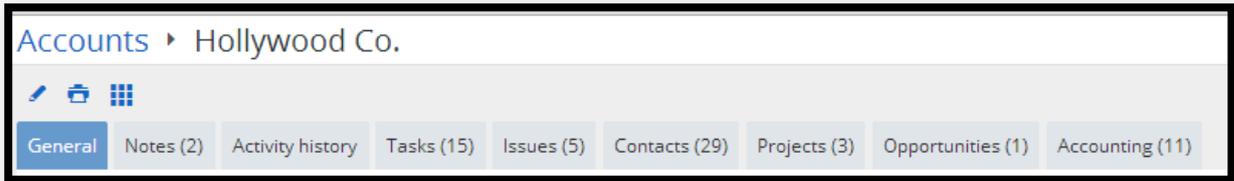
C

KA control panel:

See below how a KA control panel looks in Comidor. Apart from viewing the KA profile with the contact information, there is a handful of easily accessed tabs with all the related units!



For example, you can see 15 tasks assigned, 5 issues, 29 contacts (KA employees), 1 Opportunity and 11 Accounting transactions...



Below you can see how the Activity History looks like.

