

Large Account Management Plan

# Key Information

Key Information tells us what we need to know about the key account.

## Client organisation

Name

## Organisation profile

A few lines, eg from their web site indicating who they are, what they sell, who are their clients, what are their key challenges. Demonstrate understanding of the business we are dealing with by answering the following questions.

* Global information - big picture, the world in which the major account operates.
* Where do they want to be in 5 years?
* Corporate information –size of business, number of employees, governance structure, key challenges, key competitors.
* What problems are they facing (economic, competition, legal/ethical, talent?)
* What is their training budget?
* How are staff training and development needs identified and supported?
* Who are the current training providers?
* How is training and development decision making handled – eg centralized or through line management?

## Key contacts

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Contact name | Position | Telephone | Email | Notes |
|  |  |  |  | Eg Primary contact |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

# Overview of relationship with UNEP

Outline of our current offer/s

* Study area/level
* How was the need Identified?
* Delivery methodology
* Approximate size of the business to UNEP ie $$ and students
* Duration of relationship
* How does our offering impact their business?
* How have we shown value/ROI?

## UNEP Client Relationship Manager

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| UNEP Name | Position | Telephone | Email | Notes |
|  |  |  |  | Eg Primary contact |

# 2018 management plan

## Account objectives

Where we are trying to go with this client /what do we want from this client. Eg

* Maintain annual spend of $K
* Introduce new program to client in (discipline area/study level)
* Increase enrolments in existing program from *n* in 2017 to *n* in 2018.
* Increase spend in existing program to $K
* Target income this period
* Target enrolments this period

## Account management strategy

Outline of the approach with this client. How to we plan to get there. Eg

* Shaped opportunities
* Known requirements for coming period

## Key messages

Relationship objectives, (what do we want them to think about us)

* UNE Partnerships is the first training organisation we contact when we identify a training need
* UNE Partnerships offers high quality training programs delivered by well-respected industry professionals.

## Action list

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Activity | Due | Responsibility | Status | Notes |
|  |  |  |  |  |
|  |  |  |  |  |

## Traffic lights

To give us a quick, accurate picture of our current position and how we should move forward.

Eg against account objectives?