

Key Customer Manager Guidebook



An introduction to the key customer management guidebook

Why is customer management important?

To succeed in today's rapidly changing marketplace, key customer managers must act as partners with customers, to help them win and to drive profitable growth. To do this, it is important to enable key customer managers to be the best they can be and ensure that they deliver a leading customer experience.

The purpose of this guidebook

This is a standalone guide for all Irish food, drink and horticulture companies, providing information and guidance on priority areas of key customer management for regular reference. It has been designed to support the application of a new approach to key customer management based on knowledge and practical experience, enabling key customer managers to improve engagement with customers as well as confidently develop win-win proposals that deliver commercial benefits across different channels.

The key customer management model

We have created a key customer management model which draws on international leading thinking and will enable users of the guide to navigate the different aspects of the role; what they should focus on i.e, 'what a key customer manager should be doing in role everyday', as well as the key behaviours needed. Also included are some key tips and considerations for different channels experienced by key customer managers.

We hope this will lead to the development of longer term business objectives and plans that help drive sustainable growth.



Click here to hear Eileen Bentley talk about Bord Bia's journey to develop a World Class Marketing Strategy for clients



How to navigate the guidebook

The guide includes navigation buttons which will allow you to move forward and back through the document as well as click through or expand certain areas.



Top Tip

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Forwards / backwards

This icon will allow you to move forwards and backwards



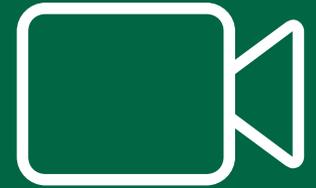
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Key customer management and critical components

Below are the elements for the Key Customer Management model.





01 Customer at the heart

Customer centricity is a shift in mindset and behaviours. It relates to the way we operate every single day, in everything that impacts our customers. It is about how we bring the voice of the customer into our business, not just through processes and initiatives, but through the mindset and behaviours that motivate every decision.

Putting your customer at the heart of your business is not just the Sales Teams' responsibility, as it impacts everyone in your organisation.

Your role in practice

Putting your customer at the heart of what you do

- Drive business growth by focusing on your customer's needs and incorporating these into internal plans & strategy
- Champion the customer and their needs across the organisation
- Leverage opportunities in order to drive category value, better returns and quality growth
- Engage colleagues in the customer agenda and its importance to business success



Click here to listen to Paul Howlett from Brand Learning talk about the importance of customer centricity to drive growth





Why is key customer management important?

What is key customer management and why should you be focusing on it?

The traditional sales role has evolved in recent years - in fact, as the industries have evolved through unprecedented change, so has the role of a customer manager.

The role has moved from being purely about selling, issue resolutions and short-term views, amongst other things, to one which is more customer-centric and partner oriented. This is independent of the size of business or the channel in which you might operate.

The businesses that have embraced these changes are the ones that have benefited from the highest levels of growth within the industry. Take a look at how the role has evolved over time to one which is partner oriented.

Old style account management	Key customer management
<ul style="list-style-type: none">• Sales orientation• Sales expertise• Issue resolution• Maximum contacts• Answer provider• Short-term perspective (2-4 months)• Sales works alone• Selling skills	<ul style="list-style-type: none">• Customer-centric & partnership orientation• Trusted advisor• Customer goal achievement• Coordinated contacts• Great questioner• Long-term results (1 year & over)• Cross-team effort• Selling, coaching & change management



Putting your customer at the heart of your business



Why should you put your customer at the heart of your business?

This is all about the opportunity to drive growth. In simple terms, the businesses that are driving significant growth are putting customers at the heart of what they do. This is happening on a multichannel basis and the principles of putting your customer first should apply whether you are looking at B2B or B2C.

Being customer-centric is about singularly focusing on your customer's needs and ensuring that these are incorporated into your business's strategy. It is also about ensuring that their needs are being championed across the organisation in a way that leverages opportunities to drive value and better returns. Finally, having the ability to engage your colleagues in the customer agenda alongside its importance to the success of your business is key.

Understanding my customer's needs

There are a few basic things which will help you understand your customer's needs. Doing these basic things well, in addition to engaging colleagues in your customer's agenda, their needs and the importance of both to business success, will allow you to build opportunities for both parties and in turn drive value, better returns and the quality growth that you are looking for.



Amazon annual shareholders report



One thing I love about customers is that they are divinely discontent. Their expectations are never static - they go up. It's human nature. We didn't ascend from our hunter-gatherer days by being satisfied. People have a voracious appetite for a better way, and yesterday's 'wow' quickly becomes today's 'ordinary'. I see that cycle of improvement happening at a faster rate than ever before. It may be because customers have such easy access to more information than ever before - in only a few seconds and with a couple taps on their phones, customers can read reviews, compare prices from multiple retailers, see whether something's in stock, find out how fast it will ship or be available for pick-up, and more. These examples are from retail, but I sense that the same customer empowerment phenomenon is happening broadly across everything we do at Amazon and most other industries as well. You cannot rest on your laurels in this world. Customers won't have it.

How do you stay ahead of ever-rising customer expectations? There's no single way to do it - it's a combination of many things. But high standards (widely deployed and at all levels of detail) are certainly a big part of it. We've had some successes over the years in our quest to meet the high expectations of customers. We've also had billions of dollars' worth of failures along the way. With those experiences as backdrop, I'd like to share with you the essentials of what we've learned (so far) about high standards inside an organisation.

Jeffrey P. Bezos
Founder and Chief Executive Officer
Amazon.com, Inc.



Four things you can do to put the customer at the heart

01 ENGAGE THE CUSTOMER

Firstly, build strong business relationships and ways of working - including creating productive meetings, being responsive to customer requests and having a systematic and disciplined way of working together. Customers should feel that working with you is easy and adds value to them. Secondly, provide excellent customer service to ensure you're building the best possible view of demand to manufacture products against.

02 UNDERSTAND CUSTOMER NEEDS

Understanding needs and then acting on them enables you to identify where mutual value can be created. There are many areas where you should gain strong Customer Understanding- e.g.

- Customer Strategy
- Shoppers
- Who their end customer is
- Buying Organisation
- Key Processes
- Supply Chain
- Operations

In addition to you spending time getting insight into your customer, Bord Bia can help clients by providing relevant customer insight.

03 CREATE MUTUAL VALUE

Having understood your customer's needs, you need to jointly identify areas where you can create mutual value. To be effective, you need to have insight on where the category is going - this may be based on the products you sell to retailers, but also the products you sell to manufacturers. In addition, it's worth looking at the key drivers of future growth which may unlock growth opportunities. By working with retailers or manufacturers, you will be able to identify the initiatives that unlock the growth potential.

04 JOINT PLANNING

Initiatives need to be built into a joint business plan, which sets the joint KPIs and goals and clearly lays out activity timescales and the responsibilities and resources required. Your plans should look 12 to 18 months out and be supported by a joint scorecard which tracks KPIs against the agreed goals. You should ensure a review process is established - with buyers you should review at least monthly, then perhaps quarterly with the buying director and every six months or annual with the most senior customer contact.





Top tips to achieve great customer engagement

1 ENGAGE THE CUSTOMER

- Create a holistic understanding with colleagues and peers
- Champion customer needs internally

2 UNDERSTAND CUSTOMER NEEDS

- Create a contact plan which is wider than just the buyer
- Invest time getting to know your customer and their end customers
- Create a hierarchy of needs for your customer

3 CREATE MUTUAL VALUE

- Think of ways to drive value
- For retail this includes increasing penetration, frequency and value
- For B2B this includes maximising the value chain in every interaction and through to their end customer

4 JOINT PLANNING

- Create a joint business plan
- Ensure you have agreement on KPIs and joint scorecards



Behaviours to be at your best

How a key customer manager 'shows up' in front of a customer, whether its B2B or B2C, is critical to what they do everyday.

The 'doing' involves the activities and the skills needed to be a great key customer manager, such as;

- Planning
- Selling
- Negotiating

The "showing up" or "being" is the mindset and the passion for the role, and the behaviours that are needed when working with the customer.

We have defined the following five key behaviours needed to be at the top of your game.

Professionalism



Agility



Resilience



Resourcefulness



Responsiveness





The behaviours you need to be at your best

PROFESSIONALISM

Being aware and able to adjust your approach to customers, recognising how they might prefer to conduct business. Listen to them, be honest and transparent in everything you do and therefore making you easy to do business with.

AGILITY

Being able to deal with new situations or changes quickly and successfully. For a key customer manager, there is a real need to demonstrate agility in balancing short-term investment alongside building sustainable, mutual growth for the future.

RESILIENCE

Being able to quickly return to a positive position in the face of a specific challenge. This is particularly important during negotiations i.e. to quickly achieve successful outcomes in support of aligned strategies.

RESOURCEFULNESS

Being skilled at solving problems and making decisions on your own. Being able to think differently to find a creative solution which will have mutual benefits to you and your customer.

RESPONSIVENESS

Being able to make a proactive and quick reaction to something or someone, either internally or externally. Without feeling the need to agree, the best key customer managers will always respond to customer requests in a timely manner.





02

Customer Understanding

A deep understanding of your customers is at the heart of being an effective key customer manager.

“To succeed in business you need to be original, but you also need to understand what your customers want.”

Richard Branson



Click here to listen to Martin Adkins from Brand Learning talk about the importance of customer understanding

Your role in practice

Understanding your customer

- Understand the overall context & environment in which the customer operates
- Invest in understanding the customer’s overall strategy and operations across all formats
- Leverage formal and informal networks and processes to develop a holistic view of the customer
- Share customer understanding and ensure customer language is understood across your business
- Be future focused - have the ability to predict customer needs using insight & foresight and have a strong opinion on where they are going



What do you need to know about your customer and where can you find it?



The context and the environment in which your customer operates in.

In order to develop a deep understanding of your customer, it is worth spending a little time considering what you need to know, where you can find the information and what questions you might ask if there are gaps in your knowledge.

There are five key knowledge areas which give you a great foundation in your customer knowledge.

1 Your customer's strategy - This drives their entire business from top to bottom. Customers will bring their strategy to life through either their identity and/or value positioning. These can be easily spotted through the physical store; the virtual, website and key communications; and their customer service experience.

2 Who your customers' customer is - Whether it's a shopper or another part of the value chain, you should see your customer as 'The King' and they must be considered in everything you do. Gain a deep understanding of who they are by observing them in store or speaking to them in depth. Understanding them will allow you to turn insights into action.

3 Know how your buyer operates - Understanding this and their key performance indicators will set you on the path to success. Remember that a buyer's behaviours and attitudes are driven by what they need to deliver, and ultimately on how they're measured.

4 Understanding the way your customer works - This will allow you to customise your plans to better meet their needs, get proposals agreed and implemented, and ensure that you do not miss critical deadlines for approval. Take the time to understand how your customer works from key strategies through to their financial & admin processes.

5 Knowing your customer's supply chain and operations - This will enable you to play an active role in ensuring the plans you have agreed with your buyer make it all the way to the shelf or depot.





In order to develop a deep understanding of your customer, it is worth spending a little time considering where you can find information about them

There are many sources of information - here are five categories which will get you started.

ANNUAL REPORTS	SERVICE PROVIDERS AND THE WEB	YOUR BUYER AND OTHER CONTACTS	STORES, WEBSITES AND CUSTOMER PREMISES	YOUR COLLEAGUES
<p>If your customer is a publicly traded company, you can access their annual report on their corporate website. The annual report can provide an excellent overview of your customer's strategies, objectives and financial performance.</p>	<p>There are a wealth of customer information service providers, such as Planet Retail and IGD for retail and Just-Food for B2B. These are great sources of general customer information. However, if they don't cover your customer, then a general search on the Web will reveal a wealth of information.</p>	<p>There is no substitute for asking your customer about their business. You will need to use effective questioning skills and make sure you ask different people the same question to get a true picture of what is happening. Be curious, ask questions and listen carefully.</p>	<p>These provide valuable information about the realities of a customer's strategy. Spending time doing store checks, walking around factories and talking with employees can reveal many insights into how the customer is executing their plans in practice.</p>	<p>Often your colleagues may be able to provide you with the information you require or point you in the right direction. Don't just ask around in your team or function, also consider asking other functions too (e.g. finance, customer service) as they will often provide a useful alternative perspective.</p>





Where to find great customer information: Top tips

ANNUAL REPORTS

Read the CEO's letter at the beginning of the report to gain insight.

SERVICE PROVIDERS AND THE WEB

Scan the web regularly for press releases and other news items that can keep you up-to-date on changes affecting your customer.

YOUR BUYER AND OTHER CONTACTS

Keep asking lots of open questions in order to uncover more information about your customer.

STORES, WEBSITES AND CUSTOMER PREMISES

Spend as much time in a store or manufacturing site to really get to grips with your customer's reality. Your buyer will also appreciate the extra interest you demonstrate when you request an in-store work day.

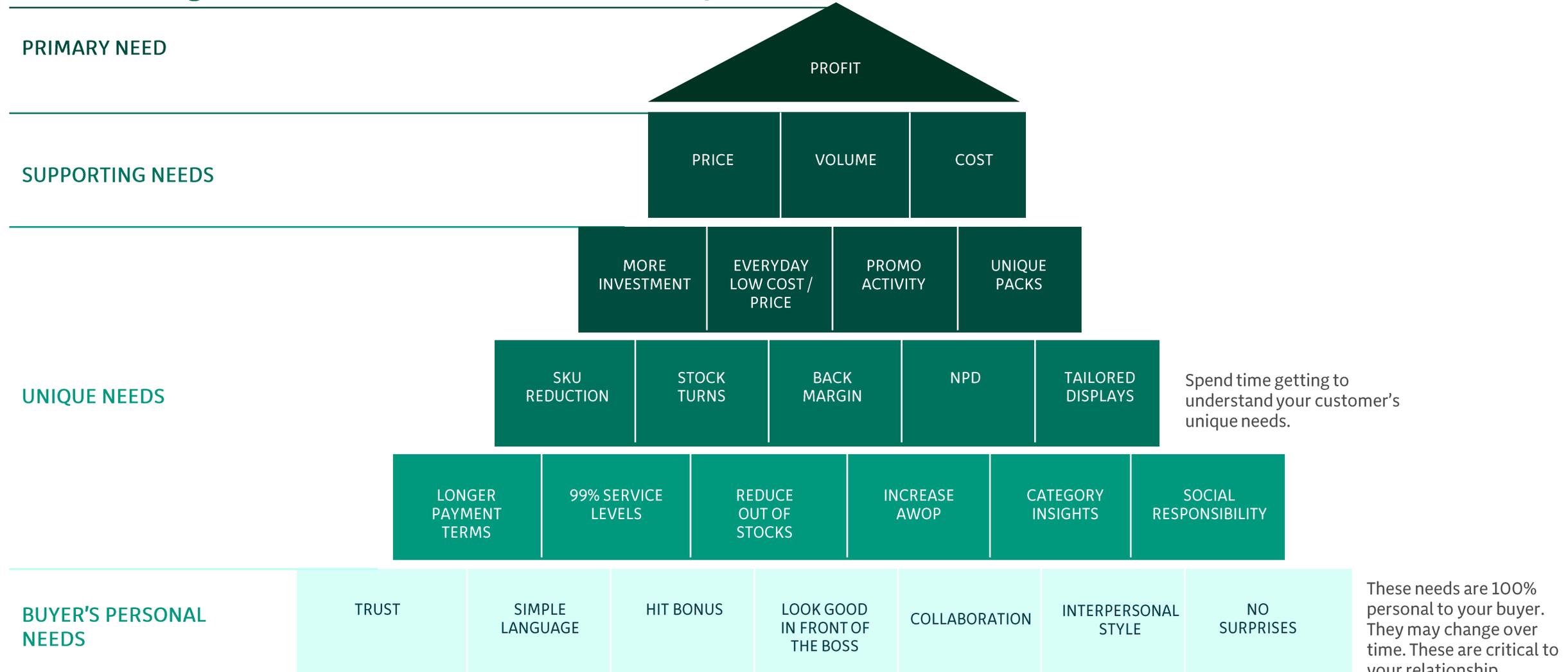
YOUR COLLEAGUES

Never shy away from speaking with colleagues to build your knowledge bank.



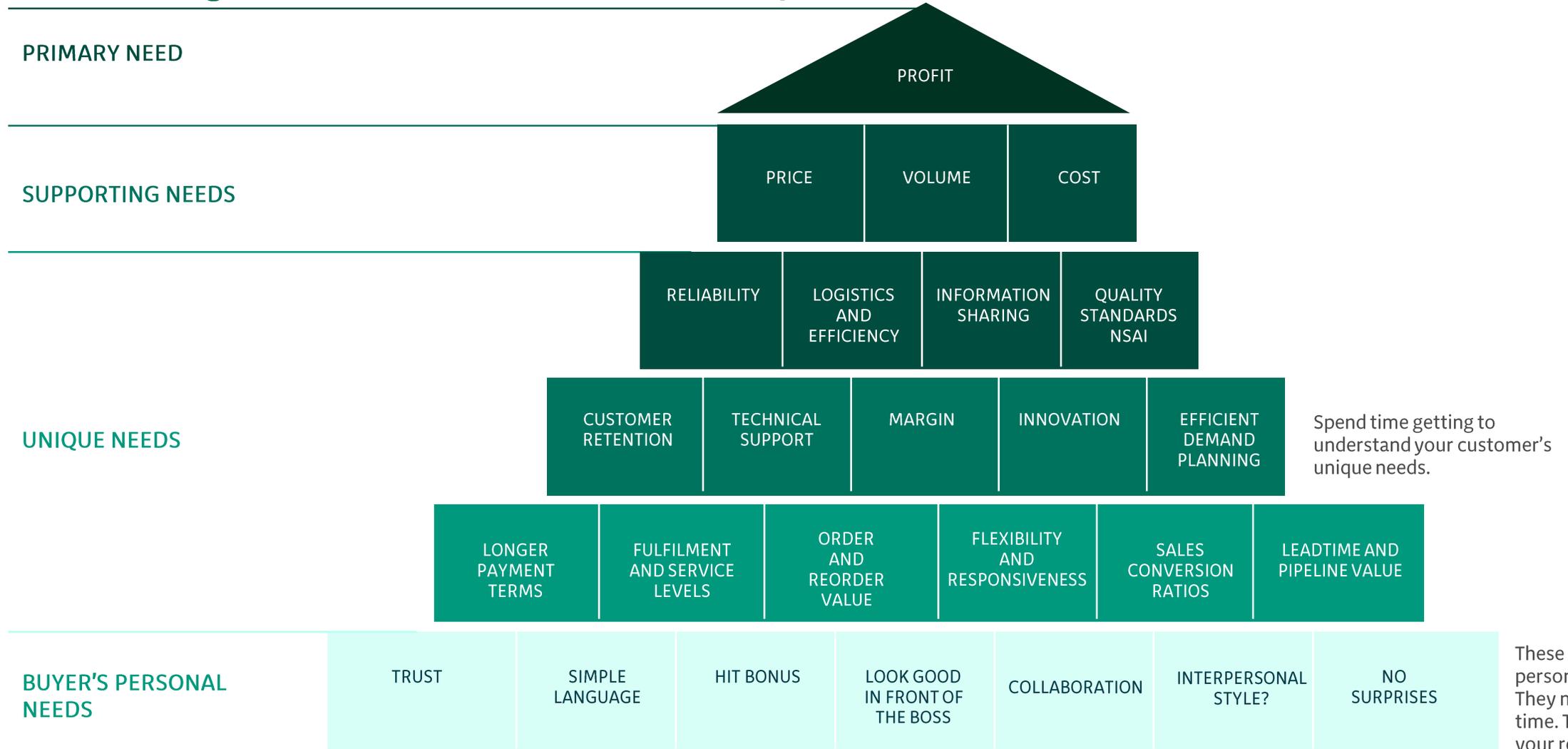


Example of a hierarchy of needs for B2C





Example of a hierarchy of needs for B2B



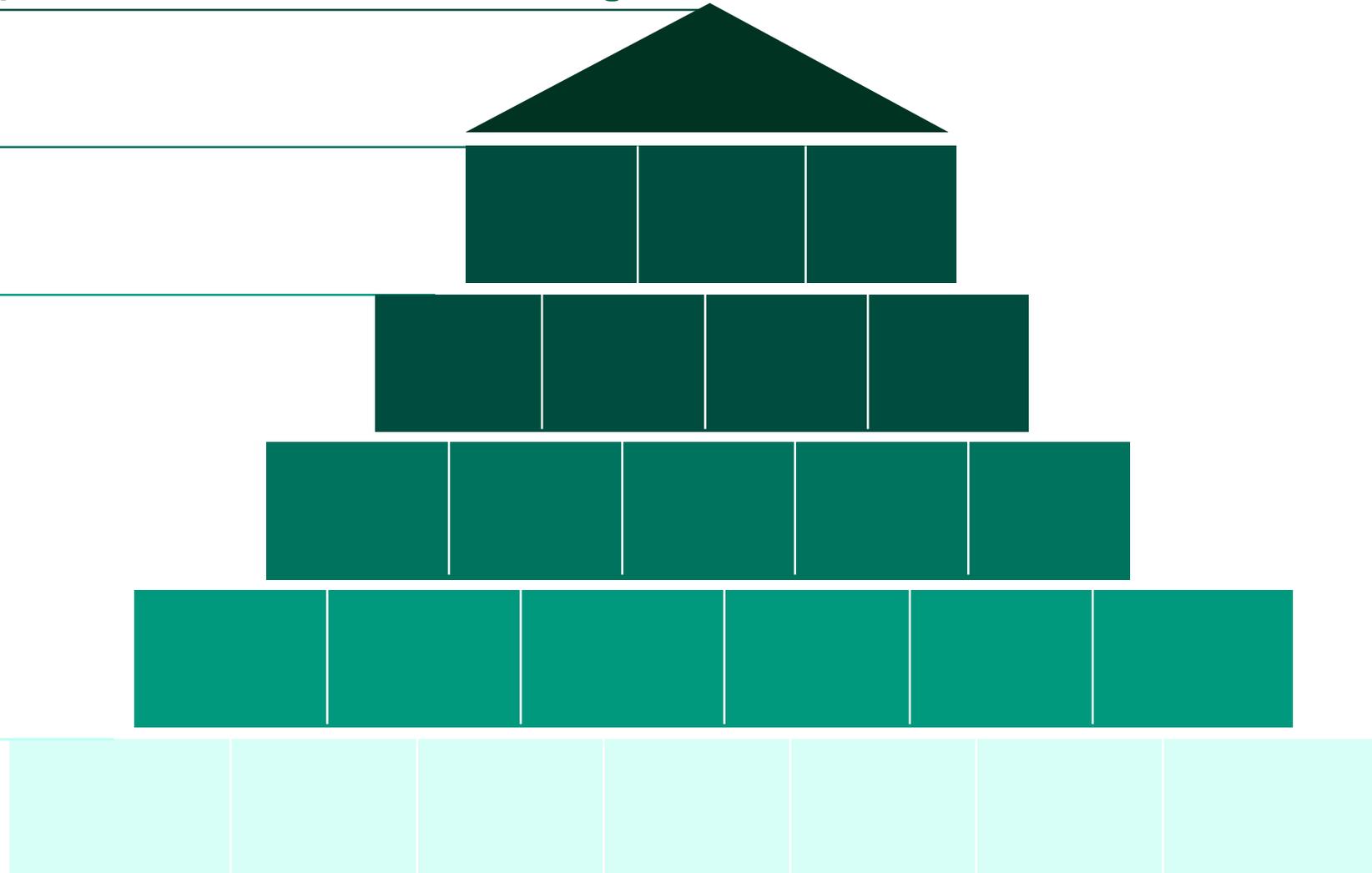
Hierarchy of needs template

PRIMARY NEED

SUPPORTING NEEDS

UNIQUE NEEDS

BUYER'S PERSONAL NEEDS





Who do you need to know ?

To further develop an understanding of your customer, spend time understanding the key people within your customer's organisation and who influences them.

Ask yourself -

- Who are the key individuals that influence your customer?
- What is their connection to your customer?
- What is their level of influence? Is it formal or informal?

Understanding the difference between informal and formal is very important.



The **FORMAL** organisational structure provides the most obvious indication about who the decision maker is



INFORMAL networks and relationships between people can have a significant impact on how decisions are made, however they are much less obvious because they are not structured

There are a number of key actions which could be useful to you -

- Spend time getting to know who the key influencers or stakeholders are and identifying where they sit inside your customer's organisation or outside of it.
- Determine what they need from you and what you need from them to move your work forward.
- Engage with them accordingly.
- Revisit your stakeholder identification regularly as they may change over time.

It may be useful to create a stakeholder map to allow you and your business to visualise who the key influencers are and how they interact with each other.

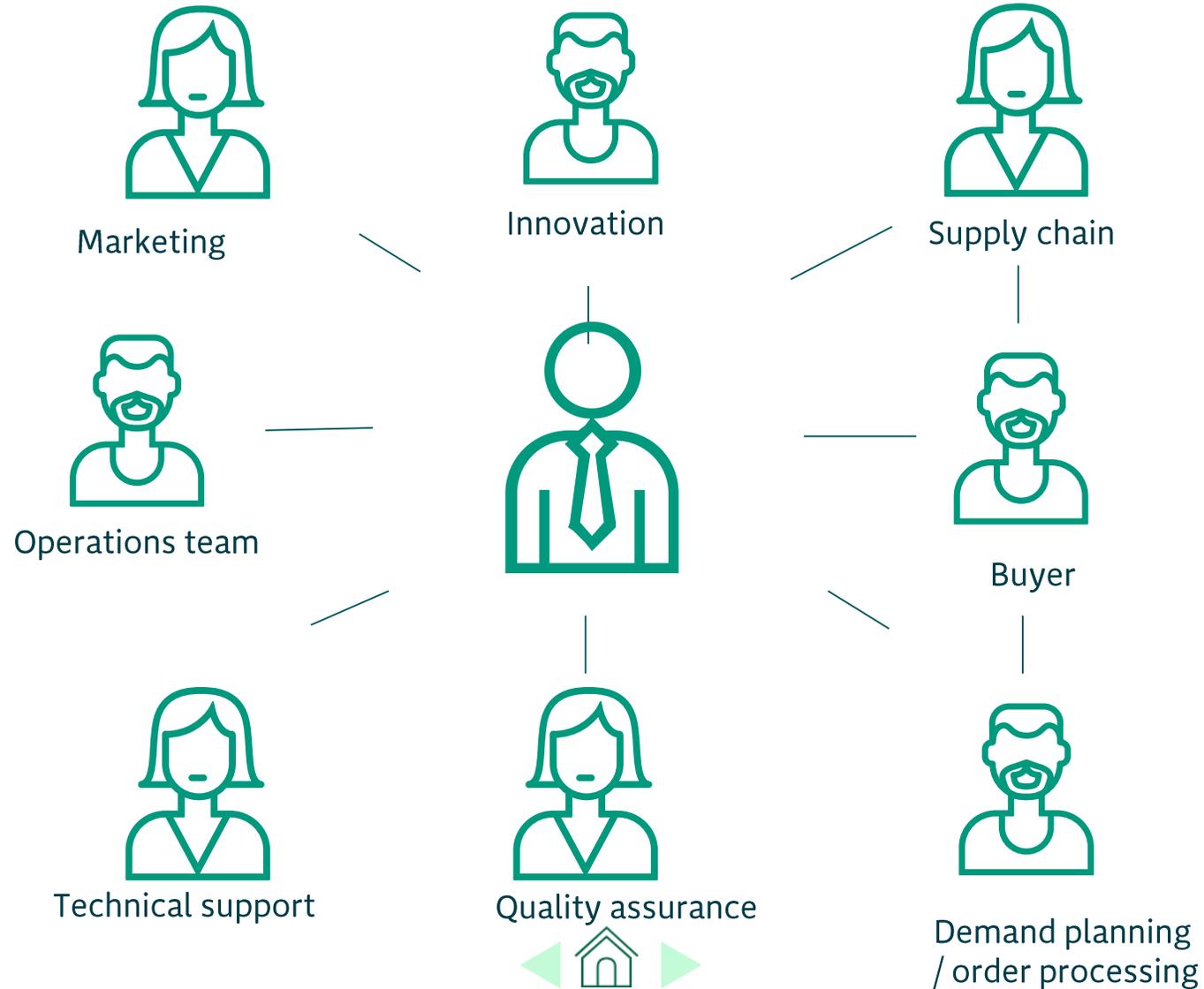


Example map of influencers & key connections B2C



Example map of influencers & key connections

B2B



Who do you need to know?

To fully understand your customer there are a number of key people and processes which are important to know

BUYING TEAM STRUCTURE

RETAIL

B2B

BUYING TEAM STRUCTURE

Allows you to understand who the key players are and helps you to plan how to broaden your network beyond the buyer

BUYER RESPONSIBILITIES

Helps you understand what topics to discuss with the buyer vs needing to talk to others within the customer's organisation

BUYER DECISION RIGHTS

Allows you to understand what the buyer will and will not be able to agree to and who else you may need to influence to get things approved

PROMOTION PROCESS

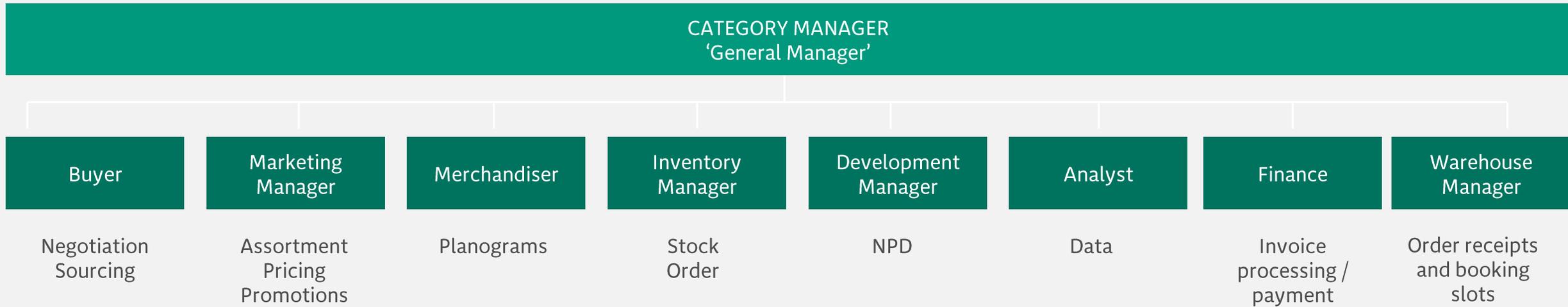
Helps you understand the lead times for activities so you can plan effectively

ASSORTMENT AND SPACE REVIEW PROCESS

Allows you to know the lead times and processes so you can influence early and ensure alignment



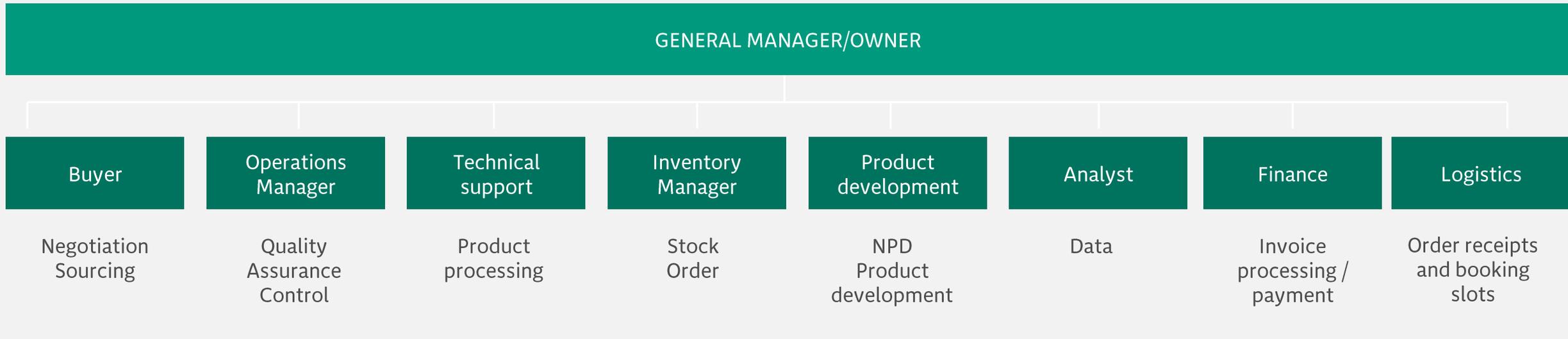
Example of who you might build relationships within B2C



The buyer is often no longer the only decision maker



Example of who you might build relationships within B2B



The buyer is often no longer the only decision maker



Using insight and foresight to understand your customer and help drive business



Having the ability to use insight and foresight is key to building customer understanding in order to drive your business forward.

Insights come from information! But they are more than just facts...

Information

What people say or do

Interpretation

Patterns and facts, questioning and challenging

Insights

Why people say or do

Insights can work two ways. They can be used to ask questions of the supplier, but insights (consumer/category) can also be proactively shared by the supplier with the customer to add value in a way other suppliers might not.

What is key, however, is information needs to be interpreted in order for meaningful insight, or foresight, to be generated.

“The important thing is not to stop questioning. Curiosity has its own reason for existing.”

Albert Einstein

What does it take to move from information to insight?

Being able to ask great questions! There is a real art to this and it is one of the most important skills that a key customer manager can have. One of the most useful tools is the insight question funnel. Click below to read more information about the questions you might like to ask and some examples.



Top Tips - Using the insightful questions funnel to uncover useful information

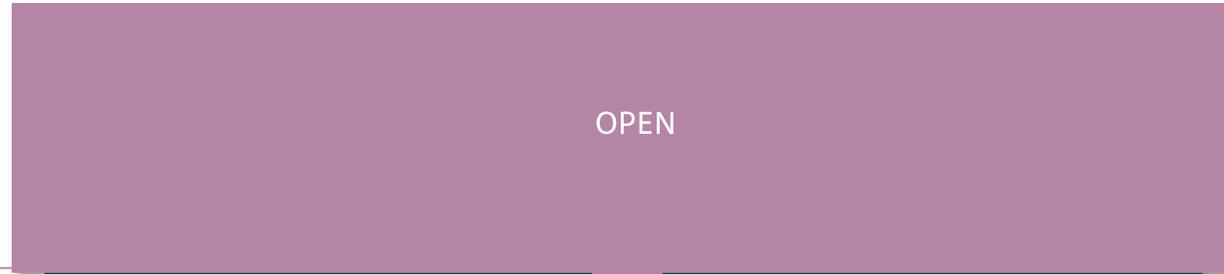


LANGUAGE

EXAMPLE

1. OPEN QUESTIONS (Broad diagnostic questions which encourage the customer to talk)

- What is your current situation?
- Can you describe your current situation to me?
- What are your major priorities for the coming year?
- What are the current business challenges you are facing?
- I saw a report on xxx the other day, what is your view?



2. CLOSED QUESTIONS (Used to gain clarification / confirmation)

- Is that important to you?
- Is XXX your top priority?
- How many suppliers are you talking to?



3. PROBING (OPEN / EXPLORING) (Used to gain deeper insight)

- Why do you think that is?
- What do you believe is happening?
- What is your experience of suppliers in this area?
- What would a "leading" supplier do?
- What do you mean by cost?



4. RHETORICAL (CLOSED CONFIRMING)

- (Used to obtain a specific answer and check facts)
- So if I hear you correctly ... (paraphrase)
- Are you interested in ...?



1. OPEN QUESTIONS

- What areas of your business do you think could be developed further?
- What are your priorities for category x over the coming year?
- What areas are must-wins for you?

2. CLOSED QUESTIONS

- How important is the XXX category for you?
- What is your growth goal for the year?

3. PROBING (OPEN / EXPLORING)

- I see your XXX range is underperforming vs the category. Why do you think this is happening?
- How might this be resolved?
- How could we work together?

4. RHETORICAL (CLOSED CONFIRMING)

- So if I hear you correctly the key challenges are and your focuses for this year are





03

Prepare to engage

One of the keys to driving mutual growth with customers is **having a great customer plan**.

Developing an effective customer plan requires you to consider many different factors and bring them all together in a plan that will drive sales and profitability. You will need to make choices about what to focus on to capture future growth.

This section focuses on being able to determine the inputs required for a customer plan, set strategies, adjust the plan to meet targets, as well as sharing the plans to gain alignment across your business.

“A man who does not think and plan long ahead will find trouble right at his door.”

Confucius

Your role in practice

Prepare to engage

- Gather and understand the inputs required for an effective customer plan, including being responsive to customer needs
- Set the long term customer strategy and make choices to support and capture growth
- Develop an aligned plan that meets business targets
- Adjust plans based on in-market performance and financial analytics
- Proactively shares customer plans internally to gain alignment and updates the business accordingly



[Click here to listen to Pedro Figueira from Brand Learning talk about the importance of preparing to engage](#)



How to set customer strategy and making choices to capture growth

Identifying your priorities

In every commercial environment, choices need to be made on where the money should be invested, how much and when.

Part of your role as a key customer manager is to understand this and ensure that you are making the right choices in order to maximise the return on investment. Simply put, choices must be made.

In recent years there has been a significant shift in the retail landscape - with the entrance of new players like Amazon and Alibaba and the shift away from classic grocery to the benefit of other stores, like discounters. Therefore different choices on where to invest and how to invest need to be made.

The same premise is true for B2B. As a key customer manager you should challenge yourself to create stronger, differentiated and responsive plans every year, that are based on emerging insights and avoid making the same choices year after year.



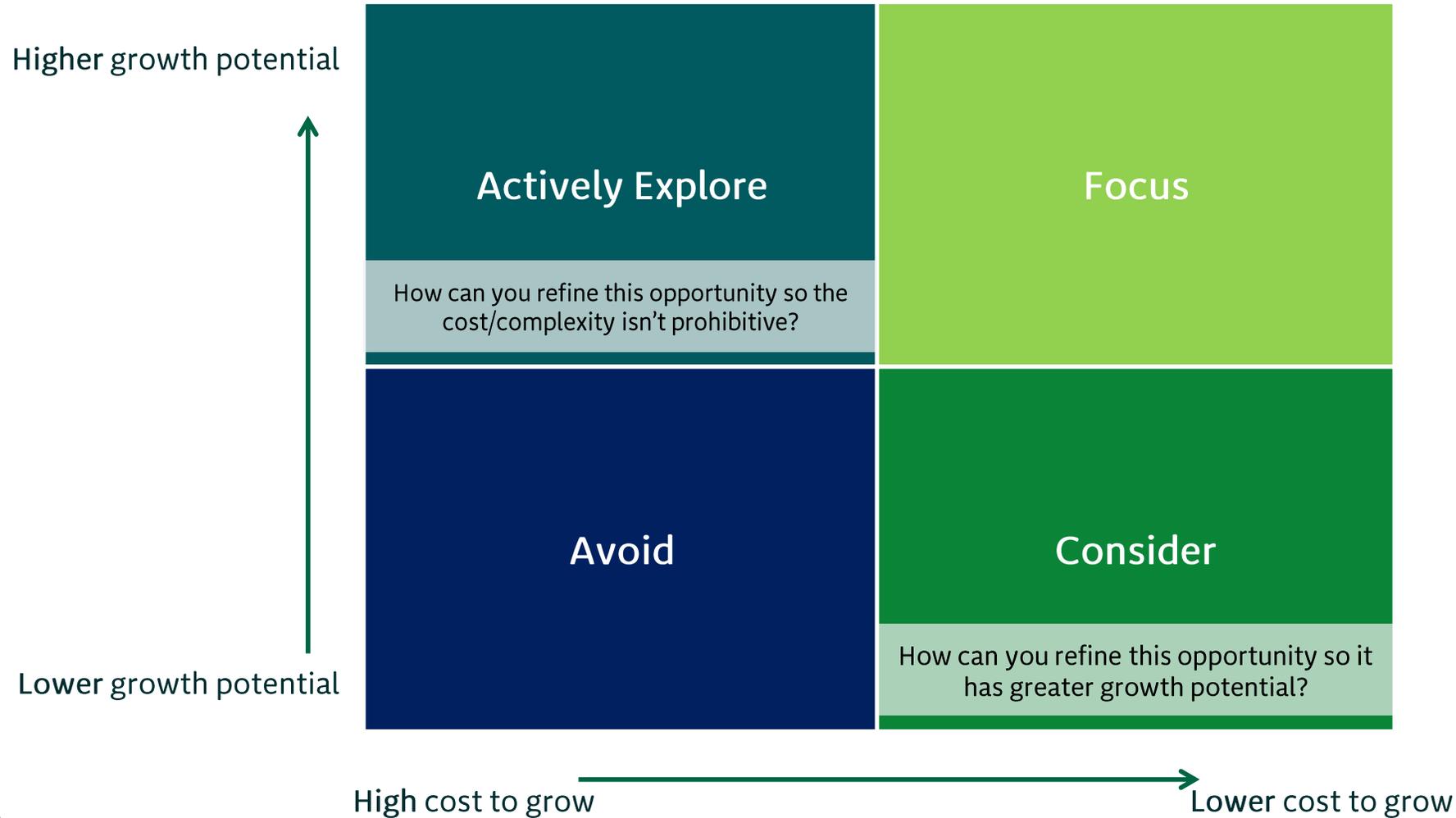
Making your choices

Consider these three principles :

- Consider which channel and customer choices will reach more consumers. Focus on:
- Ensuring you are investing with customers who are likely to convert more transactions
- Which customers are likely to help your business to drive value and mutual growth



Prioritising customers using an opportunity assessment tool





Key inputs to customer plans

The ability to build an effective customer plan is at the foundation of being a successful key customer manager.

The customer plan is built in order to ensure you have a plan that will deliver your goals, which is aligned to the business' and your customer's priorities. It also allows you to gain internal alignment to what you want to achieve with your customer and how. It should be an internal plan that forms the basis of creating a joint plan with your customer, as well as providing input to the demand plan.

In addition, it should address all potential risks and take advantage of the opportunities posed in terms of category dynamics, your competitive position and the customer's growth plans.

Developing an effective customer plan requires you to consider many different factors and bring them all together into a plan that will drive sales and profitability. You will need to make choices about what to focus on to capture future growth.

Below you can see the typical elements included in a customer plan. You may have others, but your customer plan should include these as a minimum:



COMMERCIAL KPIS & GOALS



EXECUTION GOALS



CONTACT OBJECTIVES & PLAN



CUSTOMER ACTIVITY GRID



Elements of a typical customer plan



Here you can see the typical elements included in a customer plan. You may have others, but your customer plan should include these as a minimum:



COMMERCIAL KPIS & GOALS

A clear articulation of the goals you're aiming to deliver across commercial KPIs. This might include measures such as sales, trade spend, margin as well as customer service levels, sales conversion ratios, pipeline value, quality and traceability.



EXECUTION GOALS

For each product, you will need to define your goals for executional improvement. For retail, this might include; SKU distribution, new product speed to market, share of shelf, amongst other things. And for B2B this might include; order, delivery experience, customer conversion and customer service levels.



CONTACT OBJECTIVES & PLAN

A clearly laid out plan of which customer contacts you need to work with during the year, the objectives you want to achieve with each contact, the frequency and method of contact and if there are any other associates you need to involve.



CUSTOMER ACTIVITY GRID

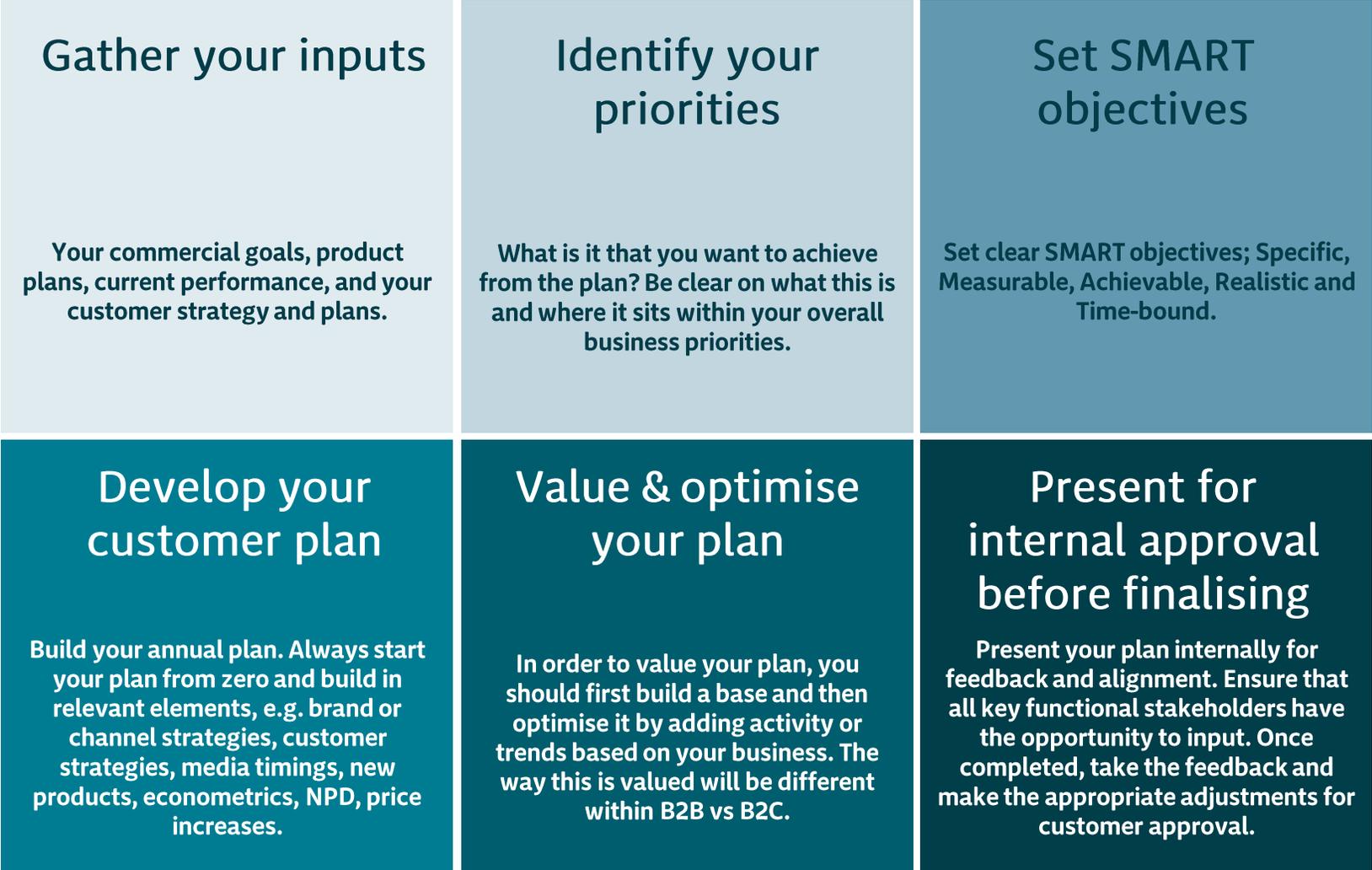
At the heart of the customer plan is the activity grid that you want to agree with your customer, as this will be a key driver of capturing growth. For retail, this might include events, promotion activities and any in-store / on-line customer specific media and for B2B this might include volume associated with new product development or changes in contracts.





A typical customer planning process

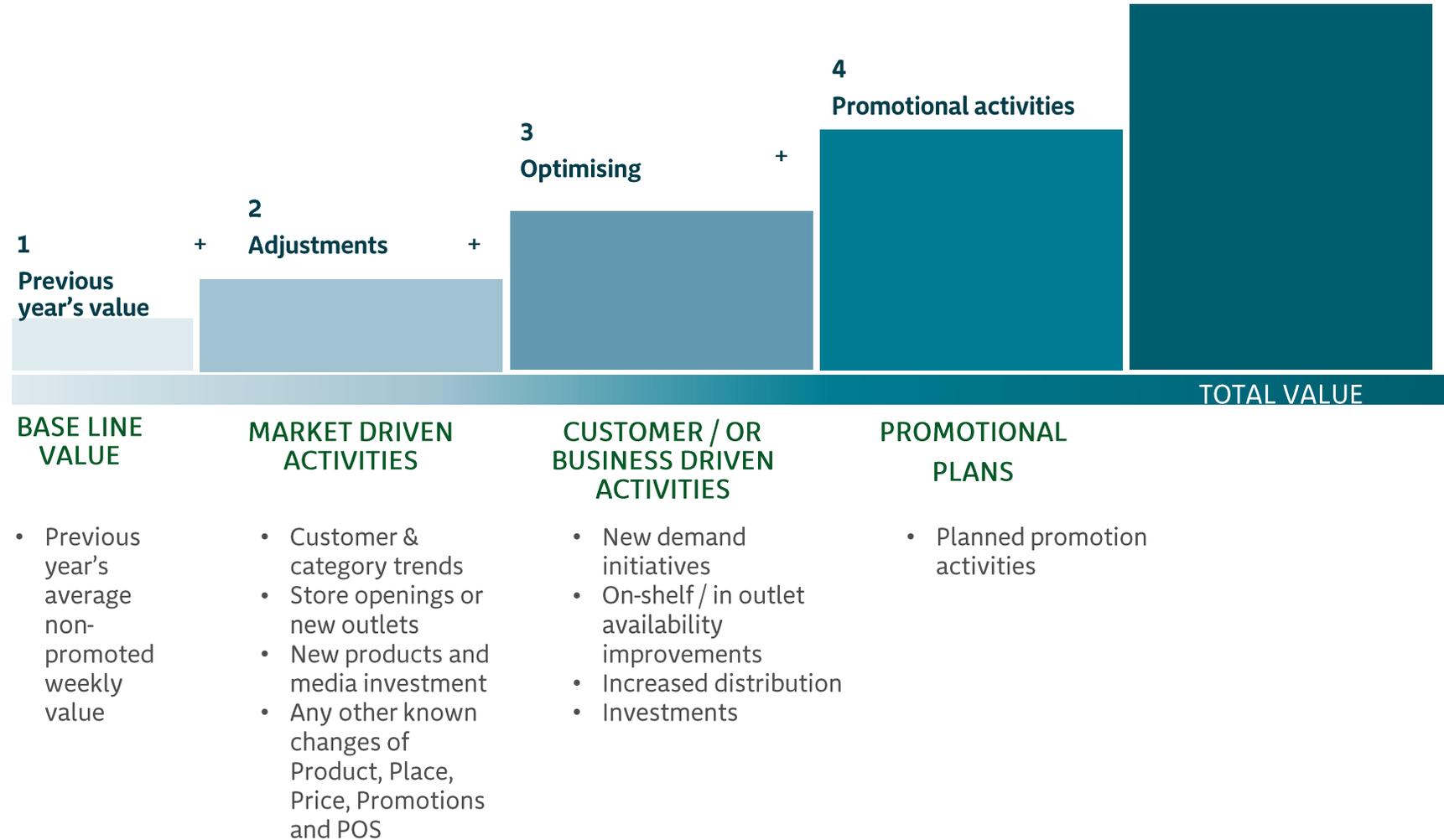
Here you can see some of the typical customer planning process steps. These can be applied to both retail and B2B. The plan is of course not static and will require regular tracking and updating.



Example of how to value your plan within B2C

In order to value your plan, you should first build the base and then adjust and optimise it by adding market driven activities and then promotion activities. This allows you to see if the plan will meet your financial goals.

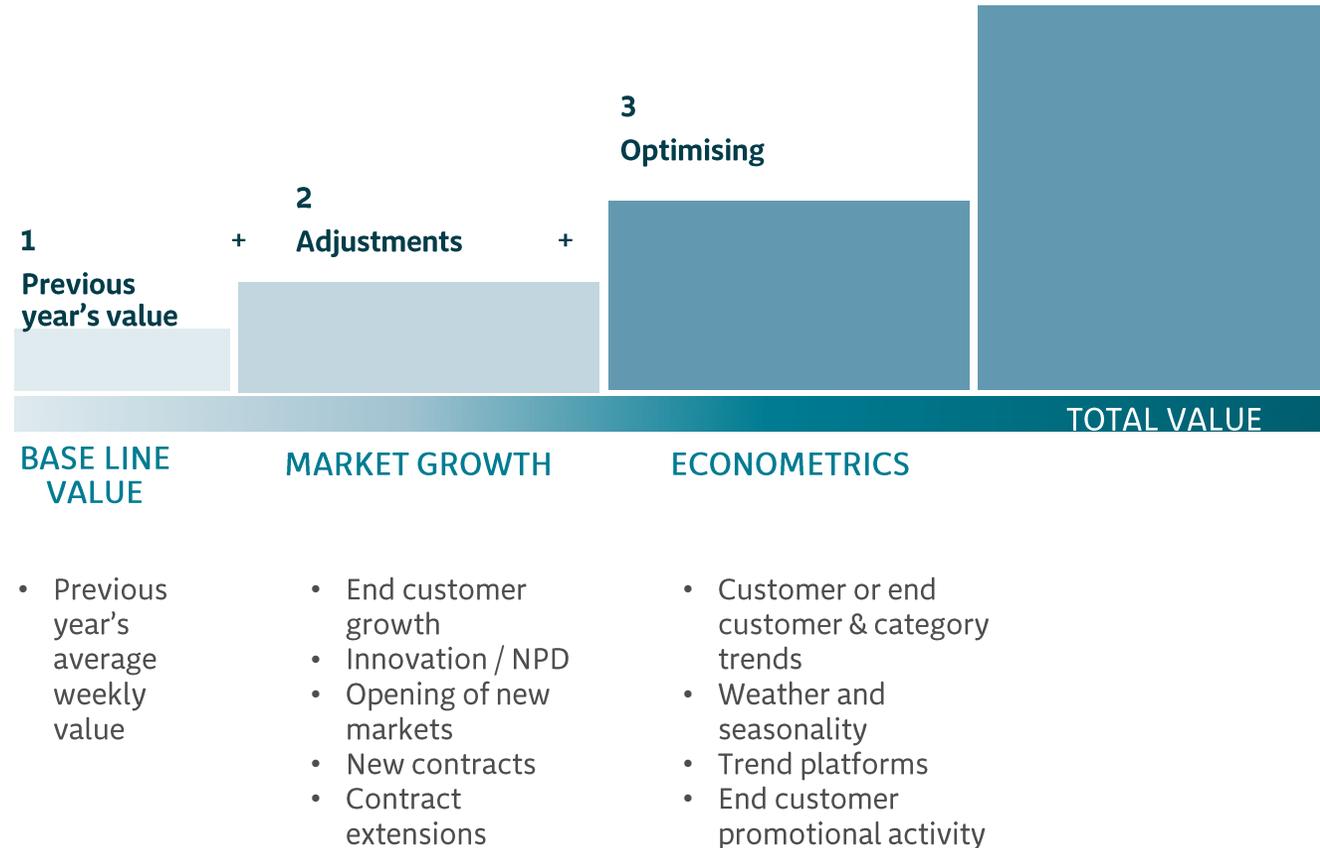
Your base value must be maximised first as these sales are more profitable than promotion sales. Once the base is maximised, the gaps are filled with the most efficient and effective promotion activities.



Example of how to value your plan within B2B

In order to value your plan, you should first build a base line and then optimise it by adding market activity and/or econometrics. This allows you to see if the plan will meet your goals.

As with B2C, the baseline must be maximised first as typically these sales are more profitable. Once the baseline is maximised, the gap is filled with market growth activity - such as new contracts and then other factors which sit under econometrics.





04

Engage

Part of your key customer management journey is where you get your customer to agree to your plans.

It's about drawing on the knowledge, experience and investment made in the 'understanding' and 'prepare' phases and bringing them to life in front of your customer. As a key customer manager, it is critical to be able to influence your customer, articulate value propositions and sell in an authentic way, as well as being able to prepare for and manage negotiations effectively in order to deliver the outcome needed for both parties. At the heart of this part of our journey is the ability to create a compelling category-based selling story, which is not only category centric but cuts through facts and challenges the customer's status quo.

Your role in practice

- Create compelling selling stories that are new and interesting; including category-focused insights and facts that challenge the customer's thinking
- Influence the customer by understanding their needs and articulating benefits, value propositions and business solutions in simple but compelling ways
- Prepare for negotiations, anticipating changes in direction and challenges. Get internal alignment before engaging the customer
- Use sales techniques and strategies to narrow differences and reach a beneficial sales agreement and commitment
- Demonstrate resilience and creativity during negotiations to quickly achieve successful outcomes



[Click here to listen to Pedro Figueira from Brand Learning talk about the importance of engagement](#)





Storytelling is powerful - in fact, we are hardwired to receive information through stories; we grow up with them, we learn through them, and we use them to connect with each other.

All powerful stories share a consistent structure. There are three clear components:

1. a set up - Introduces the situation, characters and guides us into the main body of the story
2. a challenge - The real meat of the story - the conflict and the heart; this will make us care
3. a resolution - The outcome of the story. This should get the customer invested

Below is a great example of a commercial storyboard which will help you build the story and cover the three clear components

1. TITLE What you are discussing - focus on the big idea	2. SUMMARISING THE SITUATION Provide the background and context to ensure that everyone is up to speed	3. THE BIG IDEA Why are you here - describe the big idea in a motivating way to the customer
4. HOW IT WORKS The category / consumer / shopper rationale. Make sure what you say covers all three areas	5. DESCRIBING THE CUSTOMER & CATEGORY BENEFIT What does the customer gain in either the long-term or the short-term?	6. VALUE OFFER How does the value impact the customer?
7. ACTION PLAN Next steps to make this happen. The first action should be the customer's	8. SUMMARY Reinforce the benefits	9. SCORECARD How to measure success - establish the scorecard and a plan to review

What does a compelling selling storyboard look like?



A Compelling Storyboard

	<p>The aim of today is to get your agreement of an activity plan for our exciting new product launch, by showing you how you can grow the category by 3%, whilst also growing our business</p>		
<p>SETUP</p>	<ul style="list-style-type: none"> We can make Done Stores the fastest growing player in the category as we've identified a €200m opportunity 	<ul style="list-style-type: none"> We know that the category is under pressure, declining at 1%, driven by shopper penetration decline. To address this, we know you want to premiumise the category by driving price per pack and penetrate the category with new shoppers 	<ul style="list-style-type: none"> We have a solution that supports your strategy, using one of our fastest growing brands. Oat & Go Protein is a new premium cereal bar by Joe's Oats, we have two SKUs: Original and Chocolate.
<p>CHALLENGE</p>	<ul style="list-style-type: none"> Our research indicates that consumers are increasingly time-poor and health conscious. As a result, the cereal bar market is expected to register a CAGR of 10% by 2023. We look to also tap into an unmet consumer demand of €100m for local produce as all of our oats are grown and sourced in Ireland 	<ul style="list-style-type: none"> By launching a premium product we will drive value by increasing price per pack and penetrating more shoppers. We will support Done Stores by investing €400K in a promotional plan (2 for €4) for launch and support for your activities 	<ul style="list-style-type: none"> By buying into Oat & Go Protein activity plan, you will achieve an average trade margin of 35% and grow your category by 3% through incremental sales which will equate to €200m in sales
<p>RESOLUTION</p>	<ul style="list-style-type: none"> Implement promotional plan of 2 for €4 in the first month of launch to support the launch of new product Agree in-store execution and activities 	<ul style="list-style-type: none"> There is a great opportunity to benefit from a fast growing cereal bar market, which could grow your category by 3%. This activity plan promotes the right product at the right time and will lead to strong incremental sales 	<ul style="list-style-type: none"> To make this happen we need to agree on what success looks like: <ul style="list-style-type: none"> Alignment on activity plan 100% distribution Agree measurements for success



Compelling Storyboard Template

			
SETUP			
CHALLENGE			
RESOLUTION			



The difference between selling and negotiating

Much of your role as a key customer manager will involve selling to your customer or negotiating with them - and there will be times during the year which focus very heavily on your ability to do both of these well.

In order to be at your best, it is important for you to understand selling and negotiating and the difference between them.

Selling happens first - and as a key customer manager, it is important to fully complete the selling process before your negotiate.

The conversation will naturally move back and forth between selling and negotiating, so you need to be prepared to do both.



Two integrated and complementary activities

SELLING

Involves understanding your customer's needs and interests and aligning your proposal to them

- Relationship
- Climate of trust
- Strong business case
- Mutual benefits
- Rational arguments
- Convincing style



NEGOTIATING

Involves agreeing to the "Takes & Gives" which create the value of the agreement for both parties

- Caution and control
- Clearly stated proposals
- Concession trading
- Considered responses
- Concise statements
- Calculating implications
- Controlled meetings





Key selling process

Selling involves understanding your customer's needs and interests and aligning your proposal to them while negotiating involves agreeing to the "Takes & Gives" which create the value of the agreement for both parties.

Selling is a critical process. The more you get through selling, the fewer concessions you need to make in negotiating.

A typical selling process might have the following structure.



OPEN

Opening the sales meeting establishes the environment for selling. It is the foundation for building a strong relationship. This environment can be positive and start the process towards a successful close, or be negative and immediately raise objections.



DISCOVER AND CONFIRM PRIORITIES

The need to understand what our customer wants. This is accomplished primarily through questioning and research.



PROPOSAL

The sales proposal is the story you are going to tell.



CLOSE

The close is all about getting the buyer to say yes and securing the order.



HANDLE OBJECTIONS

Your buyer will have issues or concerns with your recommendations. These are called objections and you will need to be skilled in handling them.



Top tips for a selling process



OPEN

Three tips for opening contact:

1. Develop rapport
2. Be clear on an agenda and purpose
3. Check for issues and concerns and then agree to proceed



DISCOVER AND CONFIRM PRIORITIES

Prepare questions to ask at the meeting in order to gain insight into a customer's needs and limitations related to a specific sales proposal. Use the question funnel and your hierarchy of needs from earlier in this guidebook to help formulate these.



PROPOSAL

This requires your best storytelling skills. Be prepared to be agile as your proposal may have to be adapted based on the discover phase.



CLOSE

Ask for a commitment from your buyer. There are a number of ways in which you can do this.

1. Directly
2. Give alternative options
3. Time limitations
4. With participation from your buyer



HANDLE OBJECTIONS

Develop a list of potential objections that the buyer may have during your sales call. It's important that you ask yourself if you are ready for the buyer meeting and prepared to handle possible objections.



90% of a successful negotiation is in the preparation

**FAILING TO
PREPARE**

=

**PREPARING
TO FAIL**

REMEMBER!

Your buyer negotiates much more frequently than you do, but you have more time to prepare - use it!

How to prepare for negotiations



A negotiation is defined as a 'situation where the buyer wants to buy and the seller wants to sell and the basis of the business needs agreeing.'

It is a process which has two or more 'actors' in a position of conflict who need to reach an agreement to deliver better results than the available alternative. Selling is about getting something whilst negotiating is about conceding something.

The key point to remember here is that the more you can get, the less you need to concede. Therefore, you will need some time to prepare for these inevitable negotiations.

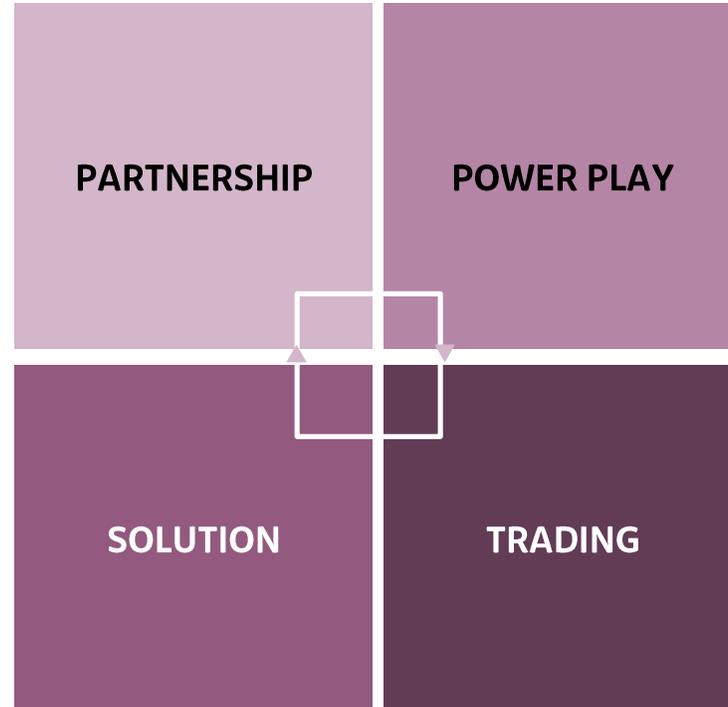
- | | | |
|--------------------------------|--------------------------------------|-----------------------------------|
| 1
There are no rules | 2
Don't take it personally | 3
Logic always prevails |
|--------------------------------|--------------------------------------|-----------------------------------|

Types of negotiation:

- Partnership
- Strategic counterparts
- 'One Plan'
- Timeless

COLLABORATE

- Partnership
- Strategic counterparts
- 'One Plan'
- Timeless



- Adversarial
- Tough & Tell
- 'One Off'
- Unannounced

CONFLICT

- Quick bargaining
- Variables exchange
- 'One up'
- By invitation



The path to preparation



Set your SMART objective for the negotiation

1

Be crystal clear on what you are trying to achieve in each negotiation
Set yourself a realistic, SMART objective
Get internal alignment against the objective

Information needs - questions to ask

2

Based on this specific negotiation identify the additional information you require and the questions you plan to ask

Issues, questions & your responses

3

Identify the issues or questions your customer may raise with you and prepare responses

Define your offer range (opening, realistic and final)

4

Be clear on what all of these are with a specific focus on the final offer - the minimum you can expect and the maximum you'll give for this

Conditional concessions

5

Consider the opportunity to trade around the offers. It is important to have a list of things you may concede as part of your offer or that you may want. Use the premise "If you...then I..."

Conditioning approach & statements

6

Prepare with a list of statements which will allow you to remain consistent, maintain a simple approach and be conscious of your buyer's tactics



Being SMART

S

SPECIFIC

Does your objective define the expected result in a clear and unambiguous way?

M

MEASUREABLE

Your objective has a clear (numeric) success criteria

A

ACHIEVEABLE

Your objective is stretching yet achievable

R

REALISTIC

Is your objective right for you and for your customer?

T

TIME-BOUND

When will your objective be achieved?



Negotiation preparation fundamentals

1

Set your SMART objectives for the negotiation

Make sure your objectives are Specific, Measurable, Achievable, Realistic and Time-bound

2

Information needs - questions to ask

Use the hierarchy of needs tool to understand your customer's needs - alongside the question funnel to formulate a series of killer questions to ask

3

Issues, questions & your responses

Anticipate any issues you may have with the relationship and the key questions which may be asked and plan how you might respond

4

Offer range

Plan and agree internally ahead of time your opening, realistic and final position

5

Identify concessions

Identify concessions which you are prepared to offer up to your customer on the basis of an agreement





05 Excellent Execution

Without excellent execution, your activities and plans will amount to very little.

Therefore, this needs to be a key focus for any key customer manager.

Executing plans with excellence is about focusing on what is needed internally and externally to deliver the customer plan in the best way possible. It involves proactively forecasting demand, leveraging execution in store, online or into manufacturing environments, ensuring the correct tracking and adjusting happens, and dealing with all admin in an effective manner.

“*Strategy without execution is hallucination.*”
Henry Ford

Your role in practice

- Prioritise activities and align internal and external resources behind the customer plan
- Proactively and effectively forecast demand
- Track and analyse plans and be able to adjust them based on in-market and financial performance
- Efficiently and effectively complete customer management administration



Click here to listen to Paul Howlett from Brand Learning talk about the importance of excellent execution

Prioritisation of activities and alignment of internal and external resources



There are a number of different activities which as a key customer manager should be completed to achieve excellent execution



1

BRINGING THE PLAN TO LIFE

- Determining resources required
- Communicating the plan with your customer
- Communicating your plan internally



2

OPERATIONAL EXCELLENCE

- Demand and supply planning
- Excellent customer service
- Financial spend management
- 100% service levels



3

EXECUTION

- Quality assurance
- Fulfilment to manufacturing and store
- In-store & online implementation and execution
- Trade fair execution



4

MONITOR TRACK AND ADJUST

- In-store
- Online
- Into manufacturer





The first step is to determine the resources required to execute the plan flawlessly. There may be colleagues that you need to involve in this part of the process or utilise other skills outside of customer management to bring this to life. For example, you may need to involve shopper marketing for special programmes to build baseline and/or promotional volume, or be in constant communication with your supply team to ensure that products are delivered to your customer’s manufacturing site on time and in full. Act as a conductor to ensure everyone is on the same page. Be specific on field resources needed. Quantify the number of calls wanted to achieve your goals (coverage and frequency).

It is also important that you communicate effectively with both your internal and external resources. Proactive communication will help resolve issues quickly.

INTERNAL		EXTERNAL	
B2C	B2B	B2C	B2B
<ul style="list-style-type: none">• Category development• Supply chain• Finance• Line managers• Marketing & shopper marketing• The field team• Customer services• Demand planning	<ul style="list-style-type: none">• Supply chain• Finance• Customer services• Technical support• Demand planning• Operations• Customer operations	<ul style="list-style-type: none">• Buyer• Category manager• Regional / District leaders• Store operations• Store manager• Department managers• Sales personnel	<ul style="list-style-type: none">• Technical support• Innovation• Site operations• Quality assurance

Bringing your plan to life - determining the resources required





As a key customer manager, you are responsible for the communication of the plan. You need to ensure everybody knows what is expected of them so that you deliver on time, in full and as expected. There are three key things you need to be clear on:

WHAT

What must be done?

WHO

Who is responsible?

WHEN

When should it be started and when should it be finished?

Communicating the plan means taking a specific set of actions and timings to make it happen. The plan is about ensuring everybody knows what is expected of them so that you deliver to satisfy your customer. An efficient and effective communication plan not only requires master planning skills, but also the ability to allocate resources, schedule and communicate what needs to be done, as well as how to do it.

To be effective, you must consider what we want to communicate but also how to communicate it and at what frequency. You may need to conduct training for other personnel that will be executing your plan. This is your opportunity to be clear on expectations and communicate exactly what needs to happen. Once the plan is agreed, you need to make sure you clearly communicate the agreed actions with your customer.

**Bringing your
plan to life -
communicating
the plan**





Demand planning is central to any businesses' growth and is crucial to being able to provide great service levels to customers, ensuring they get the product they want, when they need it. This requires you to deliver a high level of accuracy in the demand planning process. Accuracy in forecasting directly impacts our ability to deliver high levels of service to our customers.

It involves generating insights from a number of business areas in order to reach a consensus demand plan. This enables the organisation to deliver our expected growth and customer service levels.

GETTING IT WRONG

- Poor forecasting
- Out of stocks - lost sales
- Customer dissatisfaction
- Stops engagement
- Fines
- Increased inventories
- Increased operating costs
- Creating unnecessary capacity

GETTING IT RIGHT

- Increased sales
- Improved availability
- Improved service levels
- Allows right sizing and reduction of inventory
- Reduces waste and cost
- Improved transitions

**Operational
excellence -
demand planning**





Customer service and logistics are a key consideration when executing your plan. You must ensure that execution is flawless here to ensure that products are available for the next stage of their processing, or for the shopper to purchase. Whether your focus is B2C or B2B, great customer service is key to maintaining a strong relationship with your customer. Examples of top customer service priorities would include:

1 ON TIME DELIVERY	2 COMPLETE ORDERS	3 ACCURATE ORDERS	4 ALIGNMENT ON CUSTOMER SERVICE METRICS
5 TIMELY COMMUNICATION	6 EASY TO REACH & RESPONSIVE SERVICE	7 DAMAGE FREE SHIPMENTS	8 EFFICIENT ADMINISTRATION

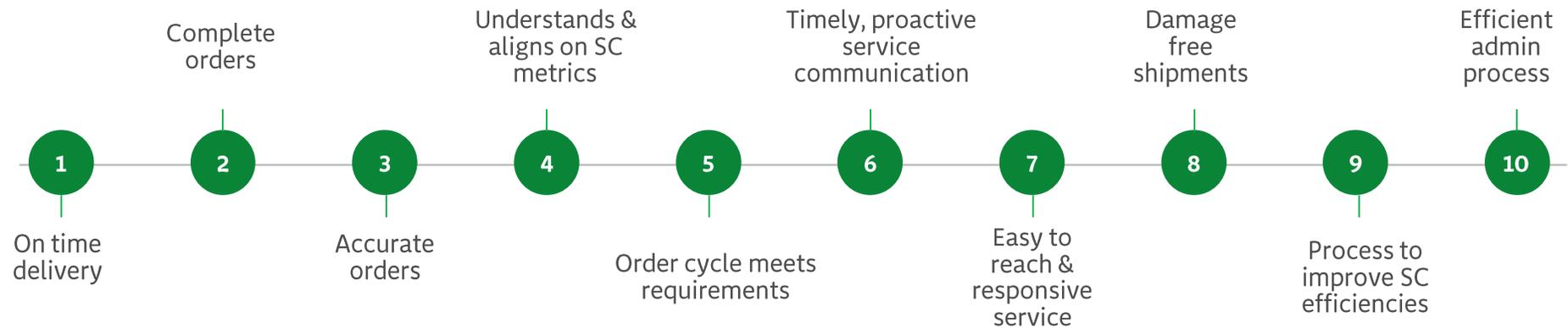
**Operational
excellence -
excellent
customer service**





Customer service and logistics are a key consideration when executing your plan, as getting it right ensures that products are available for shoppers to purchase. Great customer service is also key to maintaining a strong relationship with your customer. Be sure to know how well you are serving customers and work with your customer service associates to give the best service possible.

The 10 most important things customers want from Customer Service



**Operational
excellence -
excellent
customer service**





For both B2B and B2C, investment is a company's largest expenditure and beyond securing an adequate return for this investment, a key customer manager needs to follow the correct administrative processes to ensure compliance with audit requirements.

Typical Trade Spend Process



**Operational
excellence - trade
spend
management**



Operational excellence - trade spend management

As a key customer manager, you will need to effectively and efficiently manage trade spending with your customer. Your responsibilities are as follows:

CUSTOMER AGREEMENT			CUSTOMER EXECUTION				
Planning	Documentation	Approval	Accrual Review	Proof of Performance	Claim Validation		
<p>Before the year starts, align plans internally and with your customer. Ensure your customer activity plans support your budget position (growth / investments). The approved plan is the starting point for your forecasting and control processes.</p>	<p>Completing a customer contract is a MANDATORY step - a written agreement to invest is key. You are responsible for this. Ensure contracts are stored in an appropriate place. Check with legal on how long to keep them for.</p>	<p>You need approval at the appropriate level before an activity starts. Provide clarity on the activity budget. Document the approval.</p>	<p>Accruals ensure that our P&L captures the cost of investments. They match the timing of the cost with when the benefit occurs. Inaccurate accruals can see a mismatch of revenue and cost. Accrue with accuracy and adjust accruals appropriately, so you don't need to make large adjustments.</p>	<p>You must be confident that all payments to customers are for activities implemented in store and online. You need to obtain and retain proof performance and execution. Acceptable forms of proof are shown below.</p>	<p>Define an amount above which all claims will require proof of performance documentation. Respond on time to maximise the chance to recover the deductions. Full activity documentation should make claim processing easier. Disputes typically happen when something is missing!</p>		
Copy of ad feature / feature vision	Nielsen / IRI	POS	In-store execution confirmation	Retail link	Online landing page	Customer POS data	Other sources / types





If you have created an effective operations plan and communicated / trained the appropriate resources, then implementation of your plan should run smoothly. Remember to stay focused on completing every last part of the plan - be it the last 10 metres into store or creating a fantastic trade show display. That said, even the best plans sometimes go off-track. You should expect this in the execution stage. Expect it and be prepared for it. Be prepared to act quickly and find a solution.

Accept nothing but flawless execution. If you observe less than flawless execution, you need to contact the buyer immediately via phone. Explain to them what you observed and what needs to be fixed. Ask them if you can help in any way. Remind them of their agreements and that flawless execution will benefit them as well by maximising the sales opportunity.

Execution



Top Tips for B2C execution

Do frequent store checks to ensure everything is going as planned - in-store, online and in depot. An effective store check should include:

- Walking the store to see what is happening in other categories
- Observing the level of store traffic
- Speaking to in-store personnel to get their perspective
- Reviewing the departments that have your products
- Checking the execution to see if it is what was agreed with the buyer
- Making sure displays are located where they should be and any POS is in place
- Checking stock levels to make sure the store will stay in-stock throughout an event
- Checking pricing is correct and clearly marked on the shelf
- Observing what the competition is doing in-store



Top Tips for B2B execution

- Check for compliance over the contract period:
- Order size
- Order pattern
- Pricing
- Terms
- Speak to manufacturing personnel to get their perspective, especially the departments who handle product
- Check stock levels to make sure there is enough pipe fill
- Check pricing is correct for invoicing purposes
- Observe what the competition is doing and where they have contracts



As a key customer manager, you need to understand what has happened to know that you have executed with excellence. This means a focus on monitoring, tracking and adjusting.

You can determine how things are progressing with your execution through simple compliance tracking. You will need to develop regular checkpoints on your plan. You should do this at least a week prior to execution, the week of execution and the week after execution. Compliance tracking can be accomplished through observation, colleagues in store and/or the use of 3rd party resources. You should be closely monitoring the following:

IN-STORE	ONLINE	B2B
<ul style="list-style-type: none"> • Are products in stock? • Is the signage correct? • Is pricing correct? • Are the agreed promotions implemented? • Has the customer shipped the correct amount of product or displays? 	<ul style="list-style-type: none"> • Is the product available to order? • Is the pricing correct? • Are the images correct? • Are the agreed promotions implemented? • Are the best SKUs in the best positions on page? 	<ul style="list-style-type: none"> • Are products in stock? • Is there enough pipefill vs contract? • Is pricing to customer correct? • Have NPD or innovation streams been factored in? • Has your customer ordered the correct amount of product vs contract? • Is the end customer (your customer's customer) increasing volume? • Are there any consumer trends that will affect volume?

Proactive communication with your customer is critical when things go wrong. You should not be afraid of over-communicating. Be prepared to offer support and encouragement to your wider team.

WATCH OUTS

It's easy not to know there is a problem until after the event

An event can start out strongly but deteriorate as displays sell down and are not replenished

The product can make it to the store but you can fail at the last few feet by not getting the product on shelf

Syndicated data only represents a sample, not total stores so it may not be representative

**You must be out in the stores on a regular basis.
MONITORING THE PLAN CAN'T BE DONE FROM YOUR DESK!**



**Monitor, track
and adjust**

Overview of the role of CRM within Bord Bia clients i.e. how technology can play a role within the business

Technology is a way for you, as a key customer manager, to more effectively manage sales opportunities. For any business it is important to choose CRM solutions that not only manage sales opportunities but are able to work alongside your essential day to day responsibilities and not dilute the need to have strong, solid relationships with customers.

CRM is strongly focused on managing the sales process, capturing key metrics, solutions etc via a dashboard that can pinpoint accurately where leads are in the sales pipeline. Therefore, you can take appropriate action to convert leads into sales. The focus and strength is very much on managing sales opportunities and acquiring new clients BUT this is highly dependant on the inputs made by you as a key customer manager.

CRM enables the basic foundations for customer relationships - but it is important you develop this further, building lasting relationships with your customers. Be careful that you don't 'automate' your customer relationships, removing the personal touch of physical interactions. Make sure you truly understand your customer's needs and build a relationship based on customer centricity.





06 Trusted Partnerships

It is critical for key customer managers to be able to create long-term trusted partnerships with their customers. This part of a key customer manager role covers everything from leveraging insights, to using knowledge to drive engagement, to connecting with colleagues across the business. Creating a trusted partnership underpins the whole key customer management model and takes into account four different things you should be doing in order to be at your very best.

Your business is based on the successful relationships you develop over time with your customer. These relationships will depend on how much you trust each other and how credible you are.

Being credible means others look at you as a reliable resource and decision maker. It allows those who rely on you to know they can count on you, trust you, do business with you, and align with you.

Your role in practice

- Identify key influencers in their customer organisation
- Leverage valuable insights into personal & commercial ambitions
- Use knowledge of the customer to drive engagement, whilst always being responsive and collaborative
- Deliver incremental value by offering insight and new thinking within their category and the market, to help shape a successful future for the customer



Click here to listen to Martin Adkins from Brand Learning talk about trusted partnerships



Identifying key influencers in customer organisations



Identifying who your typical customer contacts are is important especially when deciding on when and where you invest your time.

Historically, your buyer may have been your main point of influence and decision maker within your customer - however this has evolved and now there needs to be a wider contact base to ensure maximum growth for you and your customer.

This is an example of what a contact map might look like for a retail business.

Understanding who your contacts are and being able to map them means you can decide how much time you can invest in each.

Event	Customer contact names and roles	Our contact names and role	Objective
Annual review	Trading director, buyer, category director, innovation manager	Key customer manager and / or MD	Review business performance and identify learning and success
Category workshop	Category manager, buyer, innovation manager, marketing	Key customer manager and / or category lead	Share best practice, influence customer category and innovation plan and align with objectives
Trade show	Managing director, trading director, buyer and category lead	General manager, key customer manager and / or category lead	Show support, generate end customer leads
Industry forums	Trading director	Customer VP	Share thinking on industry successes and issues
Social event	Managing director, trading director	Trading director, customer vice president	Build personal senior level relationship

Key action:

- Identifying where your relationships will have the biggest impact
- Identify the objectives for each contact
- Build a time-bound contact plan - include when and where
- Plan your contact with a clear purpose





Your business is based on the successful relationships you develop over time with your customers. These relationships will depend on how much you trust each other and how credible you are.

Being credible means others look at you as a reliable resource and decision maker. Being credible means fostering a set of very specific qualities:



Using knowledge
of the customer to
drive engagement





BE CONSISTENT

Everything you do, say and think should be consistent. The messages you're sending out, the actions you take, should all be in total alignment with who you are and what you do.

BE COMPETENT

Become an expert in your customer - someone that deeply understands their business, with the ability to analyse the challenges, develop potential solutions and make it happen. Be confident in your capabilities so people know you are the one they can count on.

BEING SINCERE

Being sincere means you don't say everything you think, but you mean everything you say. It requires commitment and dedication and the willingness to be steadfast - no matter what.

BE ACCOUNTABLE

You must be accountable for your decisions and actions. When you make a mistake, own up to it and take steps to correct the error. When you aren't sure, say so.

BE DETERMINED

Your credibility grows when you are determined in delivering against mutual commitments to success.

BEING TRUSTWORTHY

You build trust when you cooperate and share resources and you act with honesty and integrity. Your trust account is more important than your bank account. You must be authentic and open to input and feedback, using inclusive language to meet your commitments. Trust is difficult to build, but very easy to destroy.

BEING RESPECTFUL

Treat everyone with respect - not because you expect something, but because you know they deserve it.

Using knowledge of the customer to drive engagement



First impressions matter...

“

You never get a second chance to make a first impression...

Will Rogers





Here is a list of actions that you can take to build a positive relationship:



Build on a positive first impression to drive excellent execution and deal with issues successfully.

Delivery is a crucial component, how you do this drives how compelling and engaging your meeting is with your customer.

Consider how you will physically deliver in your meeting with your customer and how you can be present in front of them.

7 pillars of being present

1. Use diaphragmatic breathing and connect this to listening
2. Body language - use your eyes and have an "I am good enough" mindset
3. Use your spine - make sure that your posture is open
4. Find the floor - avoid wandering and own the space
5. If your are seated make sure that you are sat upright at the edge of your seat
6. Pause between your thoughts
7. Intention - be clear *why* you are saying *what* you are saying



Key customer manager next steps

Why is this guidebook important?

Building the skills and capabilities of key customer managers is an ongoing process - those companies looking for growth and opportunities to step change their business should look at investing time in their sales community to ready them for the future. All key customer managers, irrespective of whether they are in B2C or B2B, will need to know their role and the tasks needed to be a great at what they do. Equally as we enter a newer, more complicated world, to demonstrate the behaviours needed to be at their best.

What you should now consider

Sense check your abilities as a key customer manager. Irrespective of experience, all key customer managers are on a journey. Recognising where you are on this journey can make a difference to success or failure with customers.

Key questions

As a key customer manager, ask yourself:

- Are you practicing the key elements of a key customer manager role regularly? If not, why?
- Are there areas which are easy to adopt and can be quick wins?
- Are you employing the behaviours and mindset you need to be successful?
- Have you identified your strengths and how can you optimise these?
- Are there areas of weakness? Have you identified how you could build skills and capabilities to mitigate them?

What next

Keep up to date with all of Bord Bia's services and support in Key Customer Management and other areas by visiting www.bordbia.ie

