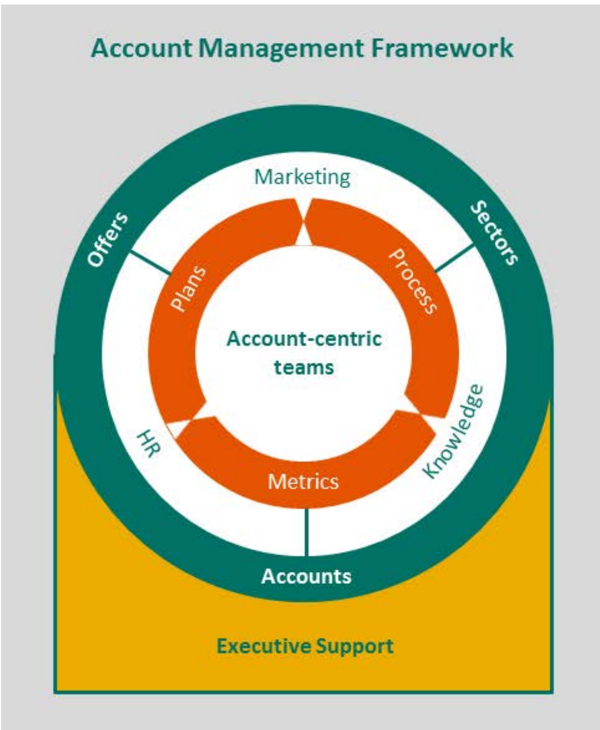
RPM Group International
Revenue Performance Management

World-class account management

World-class account management

An energised revenue growth agenda draws its strength from an inter-dependent approach to account management. Through RPMG's Account Management Framework, we bring together an entire market-facing organisation with a strong and shared focus on Priority Accounts, so that account teams receive the support they need to drive their go-to-market activities.



World-class account management begins with a shared commitment to what we call ***account-centricity*** – making customers the ***<u>centre</u>*** of the agenda.

RPMG's robust Account Management Framework brings together the best global current account planning and management thinking and practices in a consistent, rigorous approach. It enables account teams to ***plan, execute*** and ***measure*** their activities more effectively.

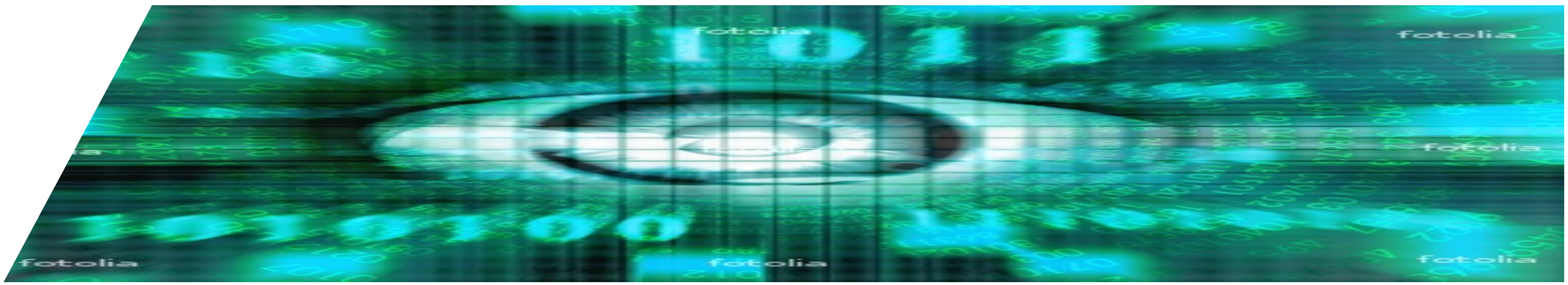
Investment in the right tools and resources to support account teams – whether through marketing, business development, knowledge or the experience, coaching and learning opportunities presented through human resources or leadership management programs.

Through the ***Accounts*** landscape focus switches to differential investment in those Key Accounts that have the greatest revenue and margin potential.

Investment in ***Key Industry Sectors*** allows the organisation and the account teams to get closer to the issues and concerns that impact Priority Accounts today, as well as into the future.

Through the ***Offer/Solutions Framework*** we develop a robust, organisation-wide approach to managing and evolving a portfolio of high-quality offerings across product and / or service lines.

Finally, strong ***executive support*** of account teams helps them leverage the opportunities – and meet the challenges – they face in the field.



Driving account management

Account Management Framework ("AMF")

Our clients have account teams around the world actively engaged in account planning and management activities. The RPMG Account Management Framework draws on the best of these practices to create a best-practice approach to account management that can be deployed across any key account landscape. Revenue growth is driven by ensuring that opportunities are maximised at the account level and that appropriate resources and tools are in place to support account teams. While a major focus is always key accounts, the framework provides a robust model for managing all accounts – regardless of size.

The Account Management Framework demonstrates how an organisation connects account strategy and executive support with the essential elements of account planning, execution and measurement. This connection is strengthened when strong industry focus and over-arching Quality-Of-Service methodologies are overlaid and integrated.

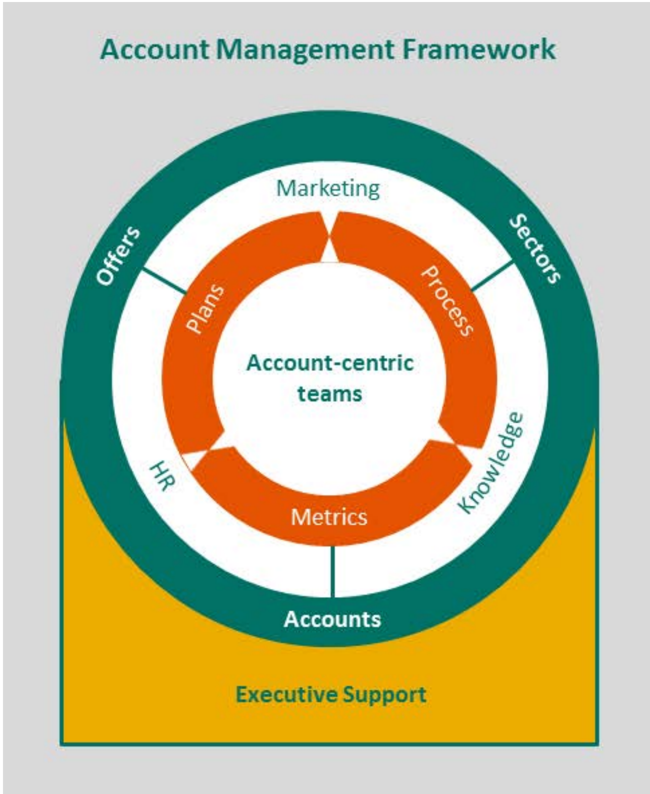
The Account Management Framework contains several key commitments, at both the account level and from executive management:

•Bringing an account-centric approach to customers across geographic, sector and product or service boundaries.

•Taking a longer-term view of the accounts landscape to ensure focus remains on the right people and resources and on those accounts with the strongest potential for growth

•Building broad and deep relationships with key stakeholders in the accounts.

As part of the Account Management Framework, we improve the pipeline management process, in doing so strengthening the revenue model for years ahead. We measure Priority Accounts across critical relationship metrics, embedding mutual accountability for performance at the account level. Effective account measurement is a key means of identifying opportunities for product and service integration across markets.



Account-centric teams

Winning consistently in the market means keeping a unified focus on customers. Putting customers at the centre of the agenda, and building sustainable high-quality relationships enhances brand equity and provides a force-multiplier for revenue growth.

Account-centricity means providing customers with the right offering to help them solve their problems and address their needs – whether they be strategic or operational, short or long-term.

The right offering can require an integrated approach involving multiple products and/or services or the provision of a single service.

The right offering should always be determined by the customer's specific issues and needs – not yours.

Account-centric teams:

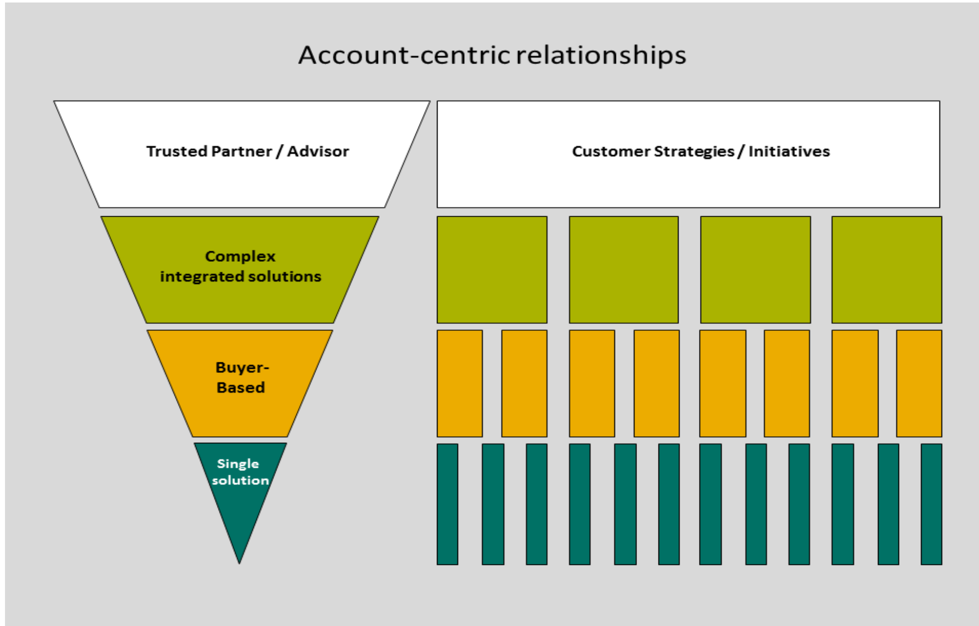
•Know their customers – including their strategies, short and long-term business objectives and their challenges.

•Think and act from the perspective of the customer

•Have their primary focus on the customer's agenda – not their own.

•Put forward solutions that are driven by the customer's issues.

•Are simultaneously proactive and reactive.



Account-centricity also means having multiple relationships with an account rather than only one or two key relationships. This many-to-many approach ensures relationships are both broad – across the customer organisation – and deep – working through the relevant layers of the customer to identify and respond to all opportunities.

By being better connected with customers at all levels their needs and perspectives are better understood, enabling the offer of appropriate insights, solutions – and the ability to build to and then from, a position as trusted advisor.

Managing accounts – plan, execute, measure

Plan

Experience teaches us that the best planned accounts are invariably the best performing accounts. Account planning is more than an administrative exercise – it is a critical component of account preparation which enables revenue growth and builds relationships. Account planning allows:

•Understanding of customer strategies, business imperatives and issues

•Understanding of customer's buying needs and habits, including the external spend on the relevant addressable market(s)

•Mapping and bundling of product and/or service offerings

•The adoption of longer-term views of revenue opportunities and the development of synchonised action plans to act on them

•Application of account-centric focus across geographies, sectors and services

•Creation of customer relationship maps to drive better connection at the account level

•Assessment of resourcing challenges and investment needs

Execution

Rigorous execution of account plans requires management and account teams to hold each other accountable for driving the right customer activity and interactions. Account execution includes:

- Customer activity calendars that plan customer interactions to share insights and points of view and to further develop relationships
- Opportunity management processes that focus on identifying, qualifying, pursuing and negotiating opportunities
- Pipeline reporting of wins and opportunities to enable greater predictability in the revenue model
- Resourcing of teams to deliver on account opportunities
- Development of account team protocols to ensure people work together in an integrated, efficient and effective manner
- Sharing leading practices and experiences, particularly among Key Accounts

Measure

Monitoring and reporting on account team performance is essential to evaluating return on investment, reviewing resourcing and verifying that the objectives of account teams are being met. Management need to take an active role in reviewing and supporting account team measures, which include:

•Account Service Executives are measured on revenue versus plan across geographies and product / service lines

•Relationship quality and strength with Board, C-Suite and other key customer stakeholders

•Activity measured against the customer calendar

•Return on Investment in account team resources

•New wins and expansion of pipeline, including the timely reporting of these activities

Effective account management

Effective account management focuses on five key activities: understand customer strategies, problems and issues; build high-impact relationships; invest in accounts for success; develop longer-term revenue plans; and develop well co-ordinated action plans. These five activities are addressed at each stage of the plan, execute and measure stages of account management, giving account teams a clear roadmap to put accounts at the centre of activities, and drive revenue growth.

Process / Activity	Plan	Execute	Measure
1. Understand customer strategies and issues	Through interactions and research understand customer strategies and problems. Define relevant parts of the customer's business. Map and bundle product / service offering to customer's issues and needs.	Drive customer interactions, deliver value and insight and develop relation-ships with all key account stakeholders.	Measure relationship quality and strength with Board, C-Suite and other key stakeholders. Assess NetPromoter measures. Measure cross product / service line integration.
2. Build high-impact relationships	Understand the customer's buying needs and processes. Create customer relationship maps, to drive better connections at all levels of the customer.	Create and execute a customer calendar to build effective "many-to-many" relationships with the customer.	Measure relationship quality, strength & improvement with Board, C-suite and other key buyers. Assess as ASQ and Net Promoter measures.
3. Invest in accounts for success	Assess resourcing challenges and identify investment needs. Prioritise investment requests and map to revenue plans.	Monitor the progress and impact of investments. Make any necessary adjustments to revenue plans accordingly.	Measure investment impact of CSP time and other resources and business development support.

Effective account management (Cont.)

Process / Activity	Plan	Execute	Measure
4. Develop longer-term revenue plans	Take a three year term of revenue potential and planning. Determine share of customer spend that we want to have.	Build and manage pipeline opportunities and wins. Monitor customer spent on addressable market and share.	Measure new wins and expansion of pipeline. Measure revenue versus plan. Measure share of customer spend.
5. Develop well-coordinated action plans	Create a “rolling” customer action plan.	Apply opportunity/pursuit management processes. Review and assess progress regularly. Refresh action plans.	Measure customer activity, including against the calendar of planned customer interactions.

Enabling the account teams

Business Development / Marketing

Business development can help account teams go to market effectively around the issues that matter to the customer.

Business development teams are encouraged to focus on:

•Bringing customer interactions to life utilising relationships maps and calendars, which help us address the customers' imperatives

•Enhancing focus on winning in the chosen markets by leveraging wider investment such as strategic marketing and pursuits

Thought leadership and marketing materials can be a catalyst for meaningful conversations with customers and prospects.

The marketing teams are focused on:

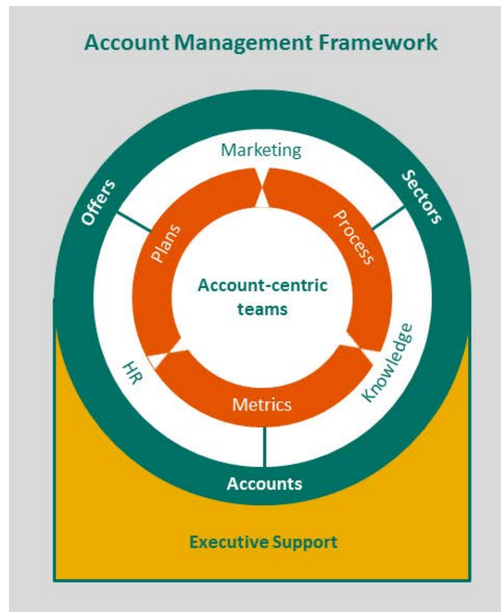
•Positioning as genuine thought leaders by addressing the issues that are top of mind for the customers.

•Developing integrated marketing programs, including seminars, roundtables and webcasts, to engage with the customers.

Knowledge / Tools

Knowledge management is focused on bringing the right insights to the right account teams at the right time and promoting knowledge sharing between people.

We encourage the building of collaboration tools to re-invigorate the knowledge-sharing culture and create better ways for account teams to share knowledge, experiences and leadership – within account teams and with other account teams.



Accounts, sectors and solutions

Accounts

Our clients are driving growth around the world by using an Account-Centric focus to work with the right customers in the right segments and with the right teams. Typically we classify an accounts landscape by size of customer, market impact and revenue potential.

One of our clients, a large professional services firm, derives approximately 50% of their revenue today from their Priority Accounts. Their goal is to grow this to more than 70% of revenue. To achieve this objective we are helping them to use more rigor to identify and qualify accounts with the greatest future long-term revenue potential so that they can differentially invest in those accounts. This increased focus in the long-term revenue potential entails taking a three-year view of these relationships. They then identify any gaps in the resourcing and other aspects of investment needed to grow those relationships over the long-term.

Sectors

The primary role of Industry Sectors in the context of the AMF is to help account teams grow revenue and enhance their brand and reputation. Industry groups are able to present the perspectives on today's business issues and help account teams link the services to these issues. Some priorities for industry sectors can include:

•Maintaining a robust network or customer Service Executives from Priority Accounts and service lines

•Actively supporting pursuits and accounts , including creating and maintaining credentials and go-to-market materials

•Creating thought leadership on key issues

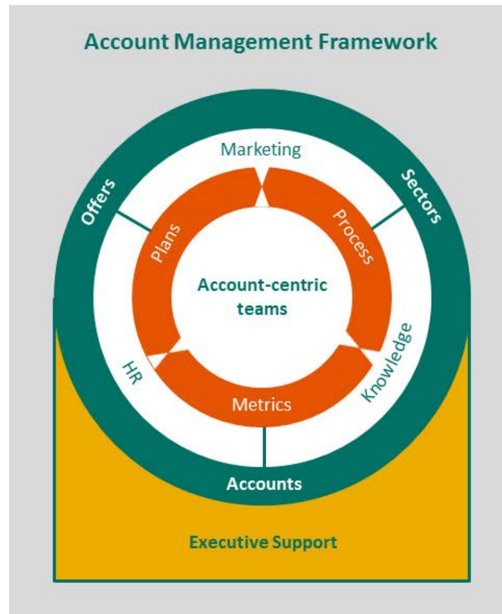
•Enhancing the brand through webcasts, surveys, speeches and participation at external industry events

•Co-ordinating sector specific education and training

•Sponsoring bench programs to enhance sector resources.

Solutions

A solutions framework provides an approach to managing and evolving the portfolio of core offerings across business lines. The framework establishes the criteria for consistent support of the methodologies , solution delivery tools and any quality procedures. The solutions framework also enables us to build common solution delivery capabilities across business lines to provide consistent, high-quality service to the customers.



Account management dashboard

Experience has shown that the best planned accounts are invariably the best performing accounts. Account planning is more than an administrative exercise – it is a critical component of the account preparation for all accounts, which helps build relationships and drive revenue growth. The Account Management Dashboard becomes a mandatory tool for all Priority Account teams to plan and measure account success.

Core account information including core product / service providers.

Account planning begins with a clear understanding of the customer's strategies, objectives and issues, and the alignment of the teams and solution offerings to what the customer's value most.

ASQ and NP programs provide insight into the customer's top strategies and challenges and how well they believe they are being served through the alignment of teams and solutions.

Development of the relationship map, which aligns customer decision makers and buyers with the account team members, facilitates ownership for developing high-impact relationships.

Core Account Information

Account Details

Area / Sub Area:		Industry Sector:		Assurance provider:		Assurance total spend:	
Ultimate DUNS #:		Channel:		Advisory provider:		Advisory total spend:	
Headquarters:		Account type:		Tax provider:		Tax total spend:	
Sales:		ASX rank:		TAS provider:		TAS total spend:	
Type of company:		Market cap:					

Account Team Details

	Name	Location	Phone	Email
Account Exec				
BD Lead				
Account Coordinator				
Assurance Lead				
Advisory Lead				
Tax Lead				
TAS Lead				
Other				

Understanding the Client

Client Objectives / Strategies	Associated Initiatives	Related Issues	Client Owner	Opportunity	Opportunity Owner	Potential 3 Yr Revenue
Strategy 1						
Strategy 2						
Strategy 3						
Strategy 4						
Strategy 5						

Client Relationships

Assessment of Service Quality

# Interviews prior FY		NP Surveys prior FY		Avg rating prior FY	
# Interviews current FY		NP Surveys current FY		Avg rating current FY	
# Further interviews planned		Further NP surveys planned		Date of next meeting	

Executive Involvement

	Y/N	# of visits to client	Planned visits
CSP			
SAP			
SAMP			
SABO			
Other			

Relationship Map

Role	Name	Owner	Status	# Meetings Planned	# Meetings YTD	Next Meeting	Date
Board							
CEO							
CFO							
COO							
CIO							
CRO							
Sales Director							
Marketing Director							

Account management dashboard (Cont.)

Revenue Plan

Financial Planning - Total Client Revenue (TCR)

Revenue Plan Overview

Period	FY09 Estimated					FY08 Actual					FY07 Actual				
Service line	Assurance	Advisory	Tax	TAS	**Total**	Assurance	Advisory	Tax	TAS	**Total**	Assurance	Advisory	Tax	TAS	**Total**
NSW															
Qld															
Vic															
NZ															
Asia Other															
Total															

Period	FY10 Plan / Forecast					FY11 Budget					FY12 Budget				
Service line	Assurance	Advisory	Tax	TAS	**Total**	Assurance	Advisory	Tax	TAS	**Total**	Assurance	Advisory	Tax	TAS	**Total**
NSW															
Qld															
Vic															
NZ															
Asia Other															
Total															

Financial Review - Total Client Revenue (TCR)

Revenue Plan Progress

Service line	FY09 Actual YTD	FY09 Plan	FY09 % attained	FY08 Actual	FY09 growth % target
Assurance					
Advisory					
Tax					
TAS					
Total					

Area	FY09 Actual YTD	FY09 Plan	FY09 % attained	FY08 Actual	FY09 growth % target
NSW					
Qld					
Vic					
NZ					
Asia Other					
Total					

Client Activity

Wins

Wins review	Total	Project Name(s)	Date	Service line	Buyer	Total
FY08 wins total						
FY09 wins YTD						
FY09 revenue from FY09 wins YTD						
FY09 wins revenue needed to meet FY09 revenue plan						

Pipeline

Point in time	Total	Project Name(s)	Date	Service line	Buyer	Total
Start FY						
End of Q1						
End of Q2						
End of Q3						

1. Only include pipeline with 50% probability of closing within next 90 days.
2. Projected close date
3. Fees for 1st 12 months

Losses

Project	Date	Service Line	Winning Competitor	Total	Primary Reasons
1.					
2.					
3.					
4.					
5.					

90 Day Action Plan

Go-To-Market Activities				Relationship activities			
Opportunity	Action Plan	Owner	Timeline	Client Executive	Action Plan	Owner	Timeline
1.							
2.							
3.							
4.							
5.							

Developing both one and three year revenue plans enables a more strategic approach to the accounts landscape and differential Investment decisions over a longer term horizon.

Analysing revenue results provides an understanding of what has been done right and where improvements are needed. In evaluating revenue results, product line and area integration should be key focus elements, as these are important measures of account centricity.

Account teams need to be aware of both the amount of new wins needed to meet the revenue plans as well as the pipeline required to generate those wins. Wins and pipeline information also provide insight on the activity level and momentum at an account level.

We often learn more from losses than wins. Sales need to understand when, how and why opportunities were lost if they are to put themselves in a better position to win in the future.

The 90-day action plan highlights the key go-to-market and relationship activities required to jump-start the execution of the account plan. It is important that the account teams move promptly from planning to execution in the account management process.

Mutual accountability

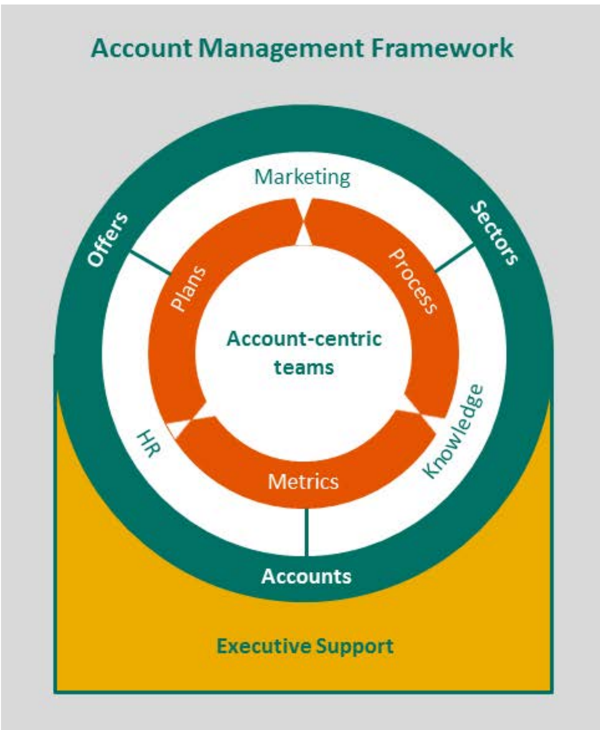
Once the strategy is sound – having the right people delivering products and services to the right accounts will drive market-leading growth. The AMF is squarely focused on achieving a step change in the execution of strategy to outperform competitors. This is even more important in a challenging economic environment. It is therefore also essential to recognise mutual accountability for the execution of the market-facing agenda.

The role of the executive leadership	The role of the account teams
• Play a senior advisory role with customers, including actively working to build relationships at the account level. • Provide investment support for accounts with potential • Support and enable effective succession planning • Review and support Priority Account plans • Review and monitor account plan execution • Align personal goals and measures with account-centricity	• The CSE's take the lead in developing the right account strategy and team to meet the customer's needs • Take an account-centric approach including both complex "bundled" service offerings and single-issue solutions • Drive effective broad and deep relationships at the account level • Effectively plan, execute and measure account-level activities • Work with sector networks to bring insights to the customers • Work across the customer Service Framework to deliver the full range of relevant solutions to the accounts • Share best practices, success stories and challenges across the account tea, and with other account teams • Commit to the delivery of high-quality in everything touching customers

Plan

World-class account planning

Developing overall, holistic, cross-service core account plans helps drive revenue growth and build relationships. More detailed business line account plans supplement and support the overall account plans.



Account planning allows an organisation to:

•Understand the customer's strategies, business initiatives and issues.

•Define what parts of the customer business will aligned with the solutions footprint

•Map and bundle offerings to the customer's identified needs and develop plans to follow up on those opportunities.

•Understand the customers' buying needs and habits, including their external and internal spend on the addressable market.

•Apply an account-centric focus across areas, sectors and solutions.

- Create customer relationship maps to drive better connections at the account level.
- Assess resourcing challenges and identify investment needs.
- Take a three-year view of revenue opportunities and develop action plans to achieve the full potential.
- Develop well-coordinated action plans to build sustainable relationships and drive revenue growth.

Account management diagnostic

Account teams are expected to complete the account management diagnostic before commencing account planning. The diagnostic is designed to help account teams evaluate their current account management practices and identify areas for improvement. The diagnostic has five key sections that comprise the five processes of the account management framework.

Process	Key activities	Current state evaluation	Improvement plan
1. Understand customer strategies and issues	1. Do we hold an annual account planning team workshop where we refresh the account plan with new perspectives and opportunities?		1.
	2. How well do we identify and understand the initiatives and programs a customer is driving to implement its strategies and do we take an account-centric approach to align them with the service offerings?		1.
	3. How well do we include the customer in the account planning process?		1.
2. Build outstanding, high - quality relationships	1. Have we developed a relationship map as well as customer calendars for all		1.
	2. Are we executing against quality metrics and receiving high marks?		1.
	3. Are we advancing relationships within the C-Suite?		1.
3. Invest in accounts for success	1. Do we understand what the account spends on all service providers in the in the addressable market		1.
	2. Have we developed a business plan outlining resources needed to become the dominant service provider in the account?		1.
	3. Has the leadership approved the plan and are we making progress resources and investments?		1.

Account management diagnostic (Cont.)

Process	Key activities	Current state evaluation	Improvement plan
4. Develop longer-term revenue plans	1. Are we accurate with the revenue plans and forecast resource needs? Do we plan for all service lines? Do we track wins, losses and pipeline?		1.
	2. Do we have a longer-term revenue forecast that is aligned with the account's total spend and the investment plan?		1.
	3. Do we understand the customer's long term strategy and how we should be be positioning ourselves relative to that strategy?		1.
5. Develop well coordinated action plans	1. Do we have a rolling 90-day action plan for the account team and does it get updated monthly?		1.
	2. How well do we monitor execution of that plan? Is it shared?		1.
	3. What is the track record for managing and closing pipeline?		1.

Understand customer strategies, initiatives and issues

The approach to account planning begins with a clear understanding of the customer's strategies, initiatives and issues, and the alignment of the account-centric teams and offerings to what the customers most value.

Organisations must take the time to understand the customers' agendas and configure the offerings to best address their issues and challenges.

How to do this:

- Leverage business intelligence, industry sector and subject matter resources
- Conduct annual account team workshops
- Use customer calendars and customer programs to qualify issues and challenges
- Bundle solutions aligned to customer issues to create offerings that provide maximum value and competitive advantage

Build high-impact relationships

Building high-impact relationships with key decision makers and buyers is an important part of any account plan.

High-impact relationships allow teams to gain a better understanding of customer issues and buying preferences, and to be first called when the customer is facing a major issue or challenge.

How to do this:

- Develop relationship maps
- Develop individual customer calendars
- Include a 12 mth rolling interaction plan for each buyer within a calendar
- Co-develop and validate the calendar with the customer

Invest in accounts for success

Understanding the resourcing and other investment gaps enables more effective investment in the accounts with the biggest revenue opportunities.

Investment decisions should be based on multi-year horizons to build long-term success across the Priority Account landscape.

How to do this:

- Differential investment plans supporting three-year revenue plans and include account opportunity, investment required, investment cost and expected revenue over one and three years
- Co-develop investment plans between the account team and business leadership.

Develop longer-term revenue plans

Developing longer-term revenue plans enables differential investment in accounts with the greatest long-term potential.

How to do this:

- Gain a better understanding of total customer spend on the addressable market
- Based on customer, industry and market trends, project customer spend over a three-year period
- Develop both one-year and three-year revenue plans across all geographies and service lines
- Link three-year revenue plans to differential investment plans
- Update one-year plans quarterly and three-year plans annually

Develop well-coordinated action plans

Developing well coordinated action plans that integrate the activities of the account-centric teams and leverage the multi-service capabilities, knowledge and relationships of those teams is critically important to success in the market.

How to do this:

- All team members work from one integrated account plan
- Advance top revenue opportunities and key relationships with a sense of urgency
- Hold all account team members mutually accountable for executing against account plans
- Conduct regular account team meetings to share progress and update pursuit strategies.

Account planning team workshop

An annual account planning team workshop is essential for every Priority Account team to either develop or refresh an account plan.
This event should be led by the senior CSE and attended by key members of the account team and focus on understanding key customer issues and linking them to solutions. The workshop will also lead to the development of a customer relationship map, and a revenue and investment plan. While less critical accounts many not need to spend as much time on a workshop they will benefit from considering elements of this model.

Workshop participants

Deciding who should attend the workshop is crucial. The team's ability to develop the right innovative service options depends on blending the practical knowledge of the account service team with input from colleagues with appropriate subject-matter expertise and industry knowledge.

Mandatory Attendees	Optional Attendees
•Customer Service Exec ("CSE") •Business Development •Account Coordinator •Business unit representatives •Facilitators	• Director of Sales • Industry Leaders • Regional BD Leaders

Example of workshop agenda and discussion

Preparation	Kick Off	Issue Refinement	Relevance	Relationship Map	90-day Action plan	Wrap up	Post workshop follow-up
Select team Create information package Conduct pre-workshop customer meetings Prepare customer issues board	Introduction Review Objectives Agenda Expected results	Review Key strategy elements Major customer initiatives customer issues / challenges	Link customer issues to the services Bundle services to create competitive advantage Quantify and prioritise top opportunities	Identify key relationships and buyers Assess quality of current relationships Assign owners and create calendar	Action plan to address top opportunities Action plan to address top relationship enhancement opportunities	Reinforce expectations regarding 90 day action plan and schedule next team meeting Schedule meetings to follow up on post workshop activities	Develop one and three year revenue plans Identify resource gaps and investment plans to address Develop customer calendar

Execute

Taking the account execution to the next level

To execute on the account plans with greater rigor requires holding the leadership and account teams mutually accountable for driving the right customer activity and interactions. Experience has shown that the best planned accounts are invariably the best performing accounts.

Superior account execution includes:

- Customer activity calendars that plan the customer interactions to share insights, points of view and to further develop relationships
- Resourcing the teams to effectively deliver on account opportunities
- Pipeline reporting of wins and opportunities, to enable greater predictability in the revenue model
- Opportunity and pursuit management processes that focus on identifying, qualifying, pursuing and negotiating opportunities
- Developing account team protocols to ensure work is integrated, efficient and effective
- Sharing leading practices and experiences among Priority Account teams
- Embedding quality in all elements of the account execution to ensure delivery of a superior customer experience

Customer interaction

Increasing the quality and frequency of customer interactions is central to building deeper, more successful relationships with customers.

Account teams need to have robust understanding of the customers' strategies, business initiatives and issues so they can match the appropriate offerings to address customer needs. At the same time it's important to be taking the right insights to the customers to help them execute their business strategies.

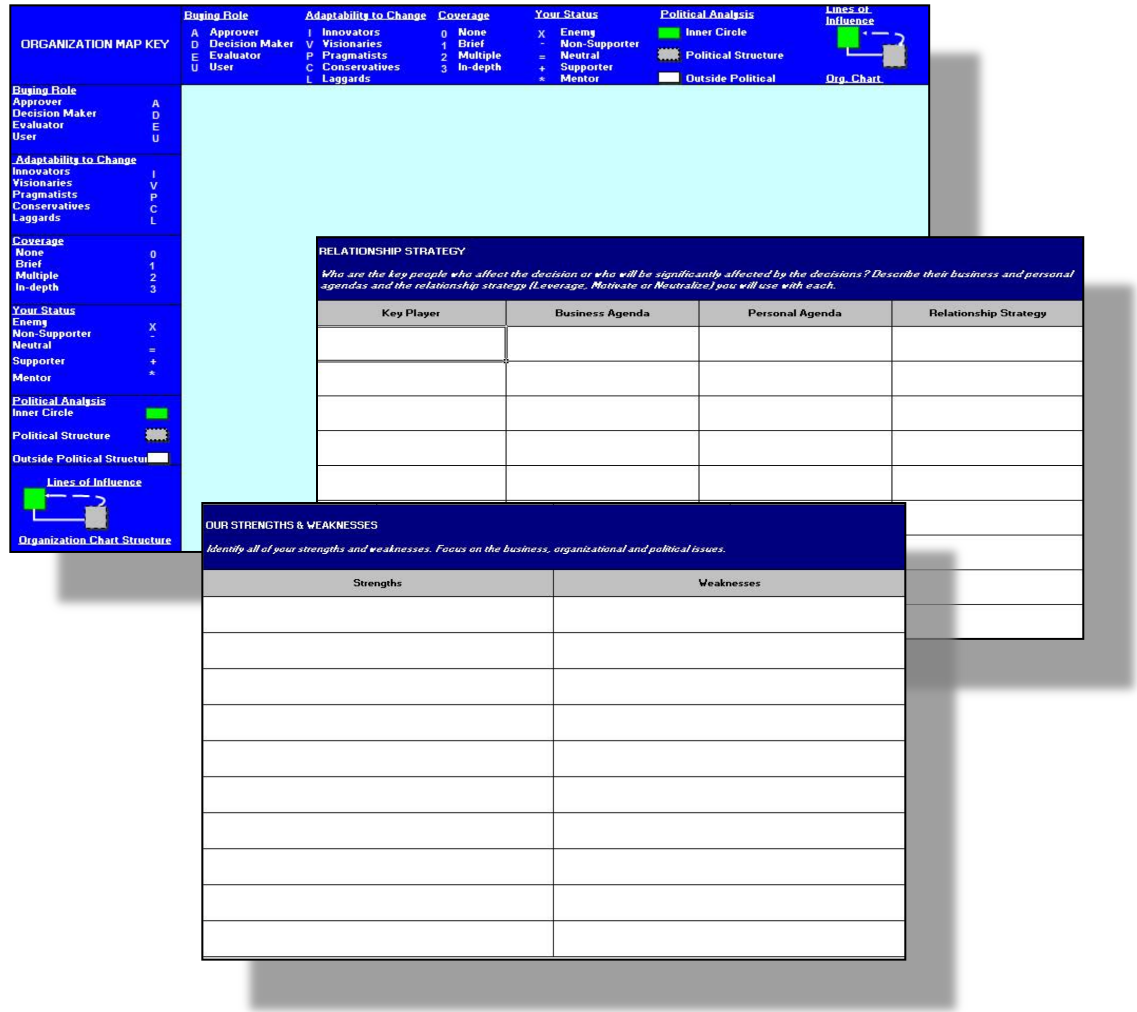
How to do this:

•Have regular interaction with the strategic (including Board, C-Suite) buyers at the account level, as well as other buying influences

•Assess the calendar of customer activities to ensure a planned and sustained approach to customer interaction throughout the year, not just at "busy" times

•Leverage appropriate customer materials at the account level, including those developed outside the account teams

•Make investment in learning and development programs to grow account leadership skills around relationship development, driving effective meetings, business acumen, communication and networking skills



Relationship calendar

Strong relationships at an account level – especially those involving the C-Suite – are a key factor in creating a trusted primary solution provider relationship that leads to greater recurring revenues.

The customer calendar facilitates the development of high-impact relationships at the accounts. It helps account teams establish the discipline to provide insight on the issues facing the customer, identify new revenue opportunities and position us as a trusted business advisor.

How to do this:

•Each calendar is co-developed and validated with the appropriate customer executive(s)

•Focus is on understanding the customer issues and bringing the right products and insights

•Monitor execution of customer interactions against plans

•Typical activities that could be included in the customer calendar:

- Conferences, seminars and roundtables
- Co-development and design sessions
- Surveys
- Meetings on current topics or technical updates
- Service updates
- Net Promoter workshops
- Training and learning events

The Customer Calendar

Our relationship commitment

Building our relationship with XZY client

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
CEO												
CFO												
CIO												
DOS												
DOM												
COO												
Other												
Other												

PITCHER PARTNERS

Our relationship commitment

Building our relationship with David Jones - CEO

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
CEO Roundtable				X						X		
Growth agenda		X				X						
CEO Hypothetical			X									
Strategy Workshop									X			
CEO Xmas Function												X

PITCHER PARTNERS

Investment monitoring

The most effective decisions regarding investment in accounts are made when this is co-developed between the account team and wider business management.

It is essential to look to account teams to identify and prioritise the levels of support required to realise the most significant growth opportunities. Exec management assess the investment priorities across the Priority Accounts to ensure support for opportunities with the greatest potential for growth.

How to do this:

•Evaluate total long-term account potential and assessment of resource and other investment gaps

•Develop a business case for investment linked to key revenue opportunities, including estimated revenue to be generated in the next one and three year periods

•Discuss investment plans with management to facilitate effective decision making across all relevant Priority Accounts

•Where required, adjust account team revenue goals to reflect agreed investment decisions

•Maintain ongoing monitoring of investment decisions, including making pursuit and solution delivery resourcing are standing agenda items for all account team meetings

Elements for investment consideration might include:

•CSE time requirement
•BD dedicated resourcing levels
•Account management resourcing levels
•Travel budgets
•Entertainment budgets

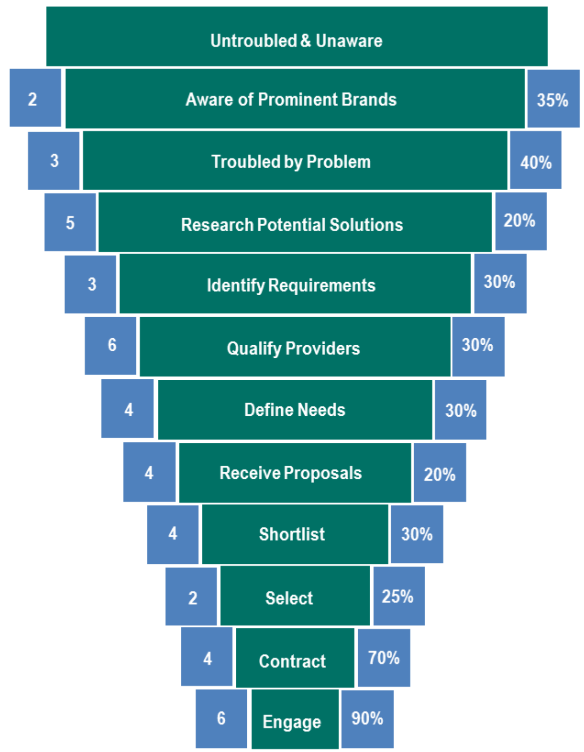
Pipeline management

Pipeline management is critical to effectively managing accounts because it enables a more robust understanding of future revenue streams, resourcing needs and skills / competency requirements in account team members.

Why pipeline matters

- Creates predictability in the revenue model – especially as the base of revenue becomes more non-recurring
- Helps in analysing future revenue streams and the required resource skills and competencies to deliver
- Assists exec and management to understand where they need to provide personal attention and sales assistance
- Helps determine the business development activities required to meet the revenue plan goals, based on pipeline activities
- Allows more accurate forecasting of service delivery resource needs, improving the timeliness and overall quality of service delivery
- Provides an important measure of account team performance
- Captures important information about wins and losses, including lessons learned

Pipeline / Funnel



Key pipeline elements

- As a rule of thumb, account teams should maintain a pipeline of qualified opportunities three to five times the revenue of "needed wins" to meet revenue plan goals.
- Account teams should regularly review the pipeline reports. Items should be qualified as opportunities before entering the pipeline.
- Account teams should track current year revenue from wins to determine additional wins needed to meet the current year revenue plan goals.

Opportunity management

Opportunities need to be continually updated and prioritised based on new account information generated through account team meetings, execution of the customer calendar as well as execution of marketing programs.

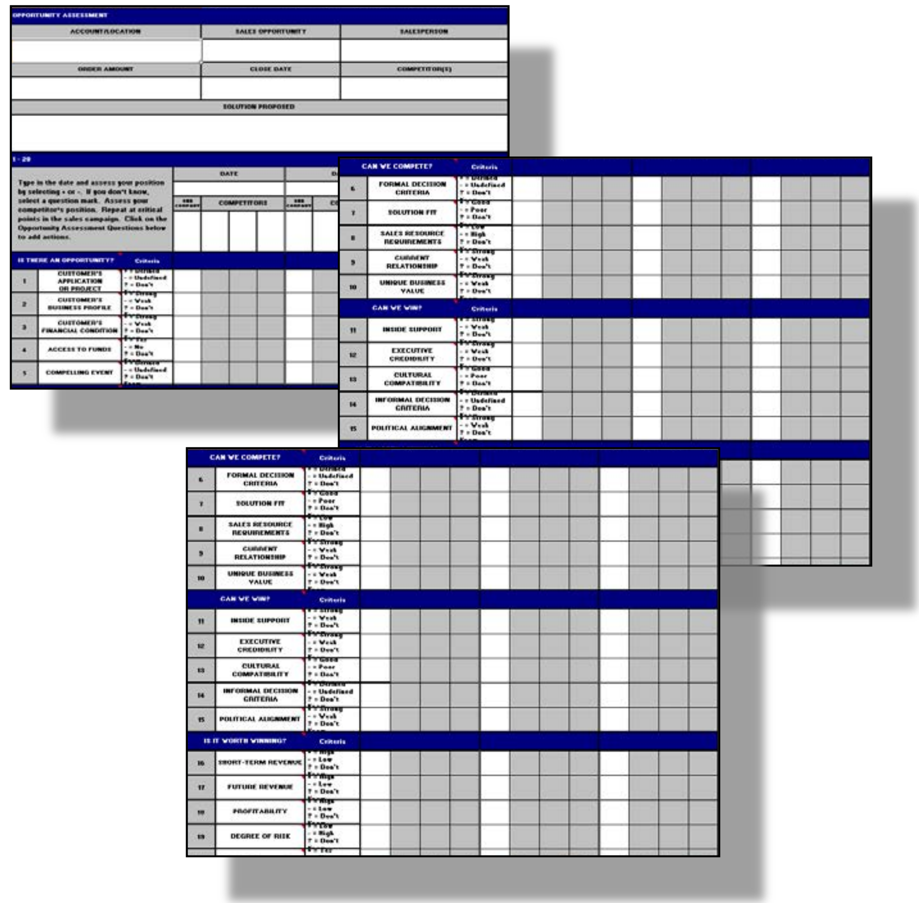
This should be done monthly by the CSE and BDE. The Opportunity Management Template can be used for this purpose.

With the top opportunities identified, the CSE and BDE can then focus their time and efforts on assisting the account team members to drive the best opportunities to revenue:

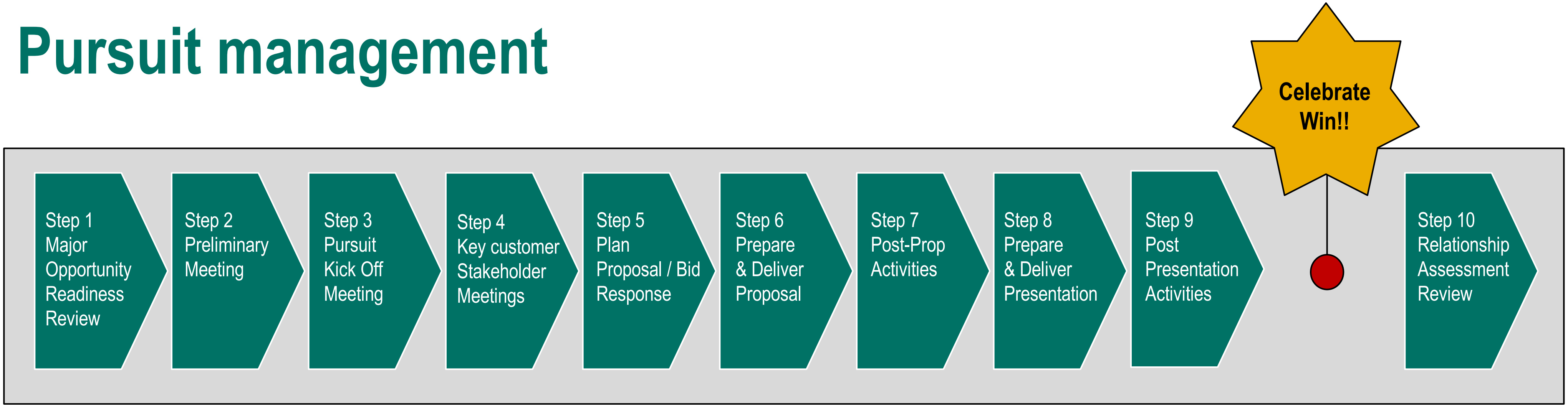
- Opportunity management starts by identifying the best opportunities to assist customers address their top issues and challenges
- The opportunity management process then prioritises these opportunities and monitors the execution of plans to move the opportunities through the pipeline by asking the following questions:
    - Does the account team have a logical plan to move the opportunity effectively and efficiently through the pipeline?
    - Does the account team have the right resources?
    - Are account team members being held accountable for the timely execution of action items?

Example: Tracking and planning the best opportunities

Opportunity Management Template



Pursuit management



The following factors are invariably critical to the success of the pursuit process:

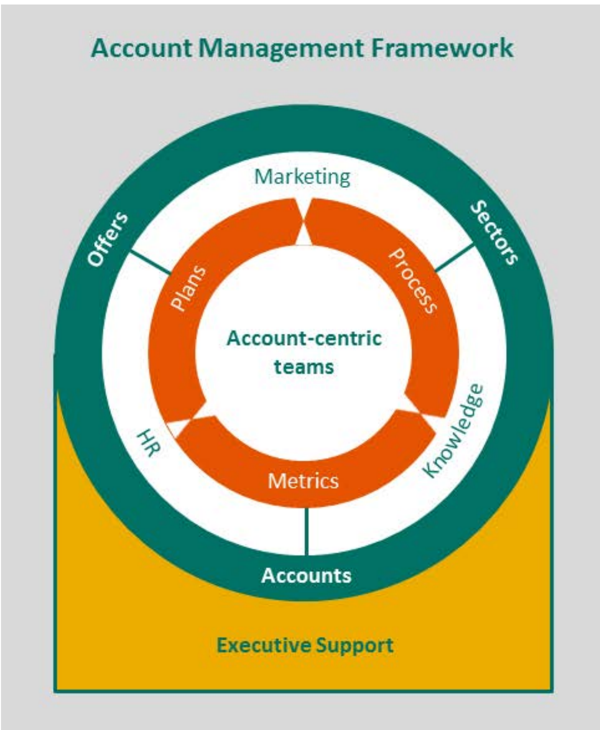
- Open access to key decision makers
- Relationships established with the account early
- Timing sufficient for robust pursuit process
- Making sure the right team is in place and their fit validated with the customer
- Exhibit strength, depth, integration and continuity
- Scoping sufficient for engagement planning and price setting
- Competitive pricing aligned with perceived value
- Understanding and addressing top customer initiatives and issues
- Validating customer expectations and protocols
- Demonstrating a strong desire to win

Measure

Executive Management takes an active role in reviewing and supporting the account team performance.

Measuring account management success

Monitoring and tracking account team performance is essential to evaluating the progress teams are making to improve relationship quality, make prudent resource investments and achieve revenue and margin results against plan.



Management takes an active role in reviewing and supporting the account team performance, which includes:

•Key account planning and pursuit activities including account planning team workshops, development and update of account plans using the Account Management Dashboard template, execution of appropriate marketing programs and commitment to customer calendar activities

•Relationship quality and strength with Board, CEO, CFO and other key customer executives

- Assessment of overall service quality
- Return on investment in account team resources
- CSE's will be measured on revenue versus plan for all offerings, business lines and geographies
- New wins and expansion of the pipeline as well as accurate and timely reporting of these activities
- Contributions to sharing leading practices

Relationship measures

It is critically important to execute effectively against customer calendars.

Relationship measures

Building high-impact, trusted advisor relationships is one of the most important elements in securing new business. This means that measuring execution against relationship activity is as important as monitoring financial measures. Our clients track and measure their relationships via execution against the customer calendar.

In addition, this enables rigorous targeting of the right customer executives and strengthening relationships in the C-Suite, especially at CEO and CFO levels.

Investment measures

Account teams that develop bold strategy to rapidly grow the account usually require differential investment to achieve their ambitious revenue objectives.

It is important to measure both the cost and return on differential investments. This information enables management to understanding the resourcing and other investment gaps, and to make the right significant investments in the accounts with the biggest revenue opportunities.

Account teams monitor the return on investment . Account team performance is evaluated, and management chooses the account teams that are deserving of additional investment to maximise the overall success of the Priority Account portfolio.

Financial measures

One of the key elements of any business model is financial success. Revenue results are one of the key measures of an account's financial performance. Analysing revenue results provides understanding of what has gone right and what needs to improve.

Revenue results are tracked for all offerings across all areas. In evaluating the revenue results, product / service and geographic integration are formalised as key measures for the CSE's in their annual personal plans. This is an important element and measure of account-centricity. The strongest customer relationships are invariably the ones which feature "many-to-many" relationships and significant revenue streams across multiple product and service lines and geographies.

Activity measures

Account planning is wasted time without the right level of follow-up activity at the account. It is important that the account teams move promptly from planning to execution.

Wins and pipeline are important measures to track. Account teams need to document the number of new wins needed to meet the revenue plan as well as the pipeline required to generate those wins.

This information also provides insights on the activity level and momentum of account teams.

Is it also important to track and learn from losses. Understanding when, how and why opportunities are lost is vital in terms of informing better positioning to win in the future.

One way to achieve this is to have account teams maintaining rolling action plans, which include top priority go-to-market and relationship development activities, activity owners and timelines.