



# KEY CUSTOMER MANAGER CHECK LISTS & TOP TIPS

# Check lists & top tips overview

The following set of tips and tools have been developed and adapted specifically for you by Bord Bia. They are designed to help your become the best possible Key Customer Manager

They provide a quick actionable check list on each part of the Key Customer Manager framework, plus an associated tool that could be used to help achieve the best outcome with your customers

The tools have been designed to be used in conjunction with the Bord Bia KCM Guidebook

# How to put your Customer at the Heart of your business

- 1 Understand that customers are central to success
- 2 Invest time to understand customer's needs
- 3 Champion customer's needs internally
- 4 Leverage opportunities to drive value, better returns and quality growth

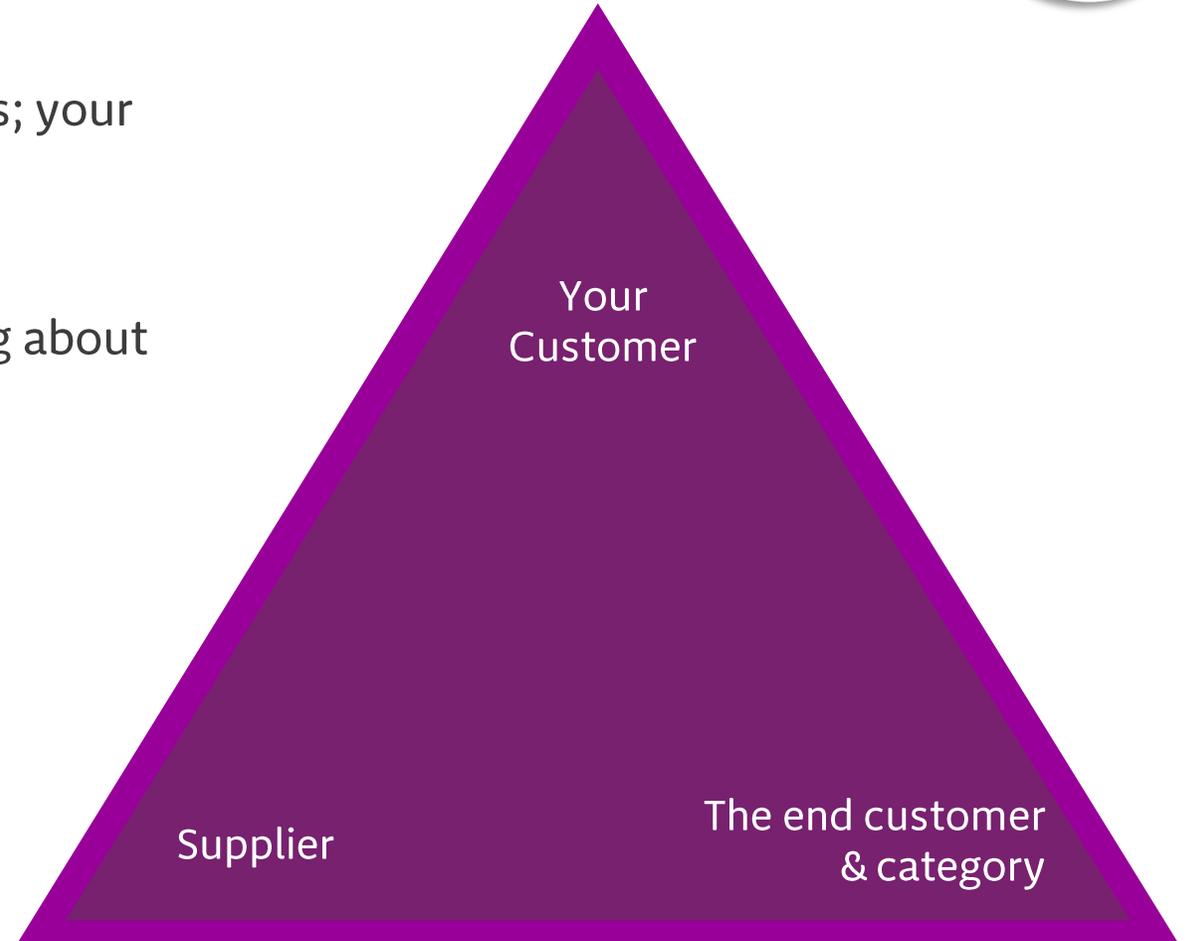


# Have a triple win mentality



A triple win is about balancing the needs of 3 key parties; your customer, the end customer and you

Ensuring the needs of all parties are addressed will bring about mutual growth for you and your customer



# How to improve Customer Understanding

- 1 Understand the customer and their environment are central to your role
- 2 Invest time to develop a holistic view of your customer and their customers' needs
- 3 Leverage insights in planning, ways of working and networks
- 4 Share knowledge internally and externally
- 5 Use insight and foresight to determine where opportunities may come from



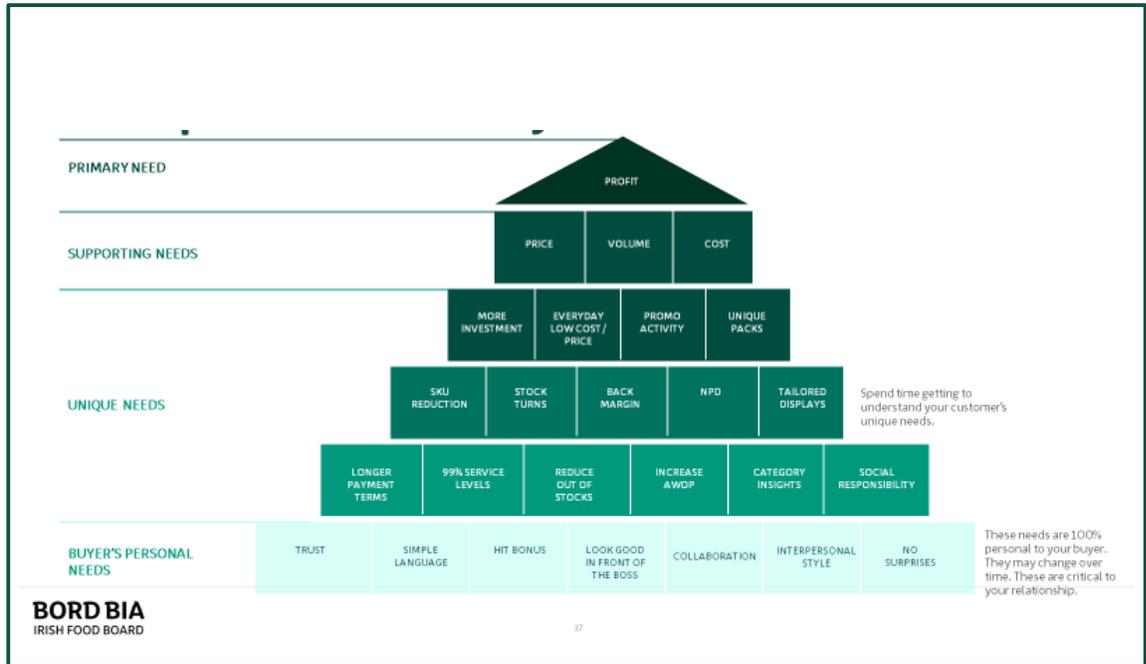
# Hierarchy of needs and the question funnel will help build customer understanding



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

LANGUAGE	EXAMPLE
<b>1. OPEN QUESTIONS</b> (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?	<b>1. OPEN QUESTIONS</b> 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?
<b>2. CLOSED QUESTIONS</b> (Used to gain clarification/confirmation) Is that important to you? Is XXX your top priority? How many suppliers are you talking to?	<b>2. CLOSED QUESTIONS</b> How important is the XXX category for you? What is your growth goal for the year?
<b>3. PROBING (OPEN / EXPLORING)</b> (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?	<b>3. PROBING (OPEN / EXPLORING)</b> 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?
<b>4. RHETORICAL (CLOSED CONFIRMING)</b> (Used to obtain a specific answer and check facts) So if I hear you correctly ... (paraphrase) Are you interested in ...?	<b>4. RHETORICAL (CLOSED CONFIRMING)</b> So if I hear you correctly the key challenges are .... and your focuses for this year are .....

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Use the insightful question funnel to help build your customer's hierarchy of needs. This is a continuous task and your customer's needs will change over time. More information on how to do this can be found in the guidebook

# How to create a Trusted Partnership

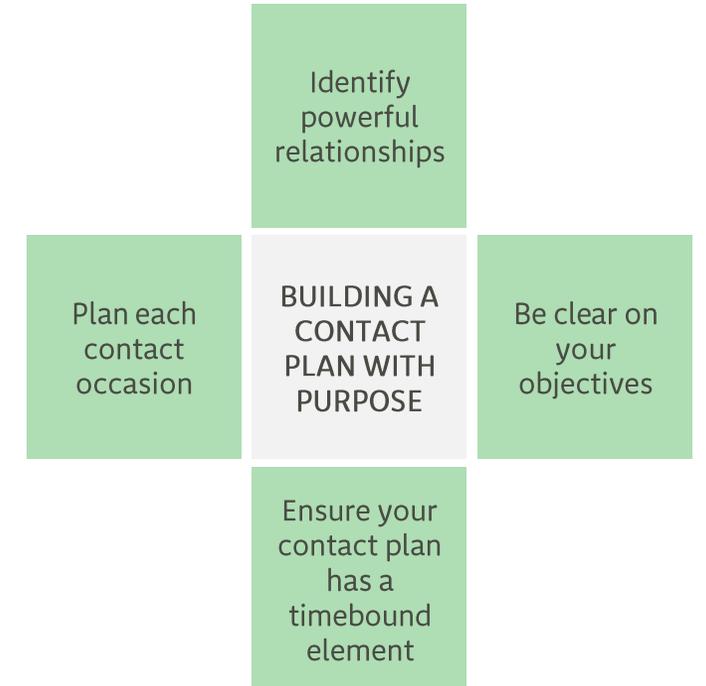
- 1 Live the right behaviours every day
- 2 Identify who to build relationships with within your customer
- 3 Develop a contact plan to drive engagement & involve colleagues in the process
- 4 Deliver value using insight and different ways of working to shape success for your customers
- 5 Remember how you show up matters!



# How do you build a contact plan with purpose?



- 1 Identify where powerful customer relationships will have the biggest impact
- 2 Identify the objectives (medium and short term) for each customer contact
- 3 Build a timebound contact plan which identifies the best means of contact
- 4 Plan each contact occasion - you must always have a clear purpose in mind



Use this model to identify and build contacts that will lead you to more trusted relationships with your customer.

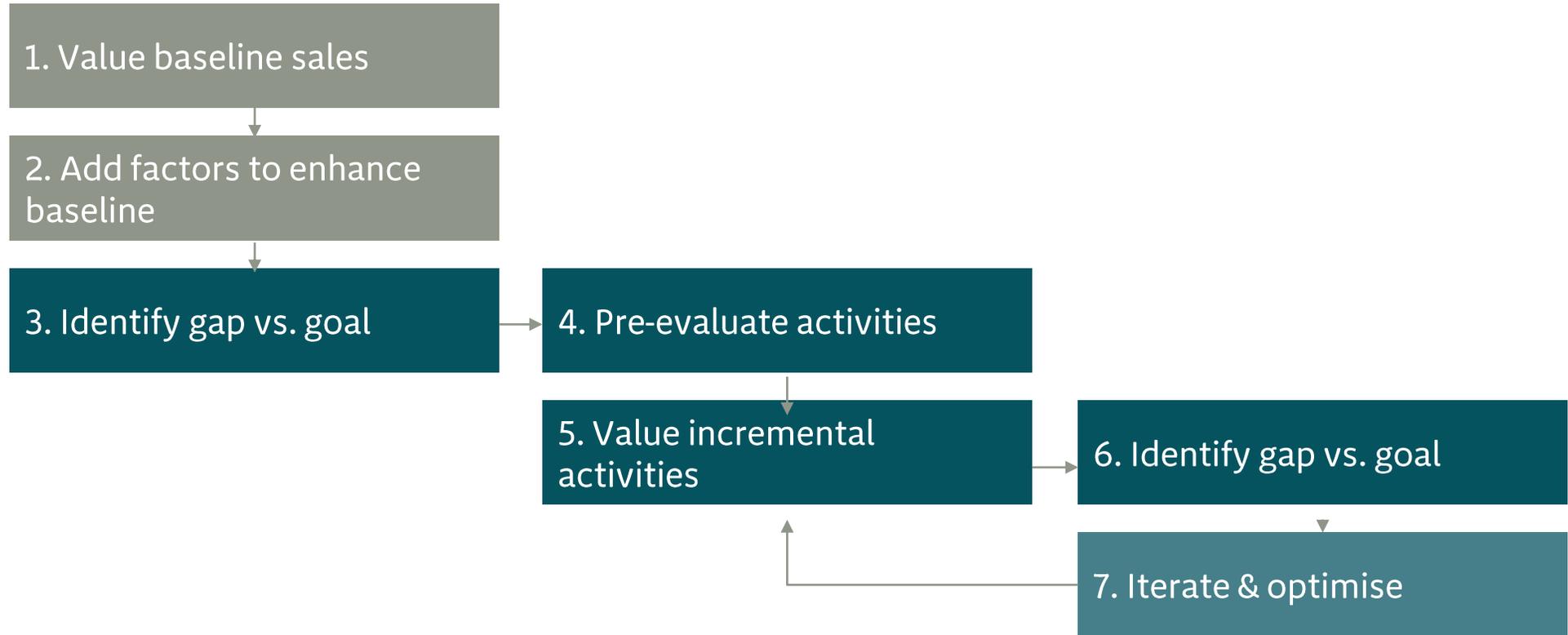
More information on how to do this can be found in the guidebook

# How to become great at Preparing to Engage?

- 1 Recognise it's a critical part of your role - there is a need to master it
- 2 Build an ongoing understanding of business performance
- 3 Create a plan that finds mutual benefits for your customers and your business
- 4 Identify ways to drive profitable baseline sales
- 5 Consider how to increase the quality of your plans and align them to business targets



# Valuing your customer activity plan



This iterative process will allow you to value your customer plan - whether you are in B2B or B2C. More information on how to do this can be found in the guidebook

# How to be great at Engaging by selling

- 1 Be crystal clear on the objective of your selling story
- 2 Summarise the situation to set up the jeopardy
- 3 Make sure you have a compelling big idea to catch the buyer's attention
- 4 Resolve the jeopardy with a clear articulation of how it works (the plan)
- 5 Reinforce how your plan will benefit the category and your buyer



# The Selling Process



Use the selling process to help structure your storytelling. More information on how to do this can be found in your guidebook

# How to be great at Engaging by negotiating

- 1 Only move to negotiation when you have exhausted selling
- 2 Preparation is a critical component of successful negotiations
- 3 Set SMART objectives and decide what you can and cannot negotiate
- 4 Plan your trading of variables and offers
- 5 Any moves in the negotiation should be conditional
- 6 Be sure to condition your customer before, during and after negotiations



# Negotiation from Strength Template



**Negotiation from Strength**

**SMART Objective**

Your objective for this negotiation

**Questions** What questions do you need to ask the other side?

Information Need	Question to ask

**Issues & Responses** What issues might the other side raise and how will you respond?

Issue Raised by Other Side	Your Response Statement

**Negotiation from Strength**

**Negotiation Variables & Offers**

List the things you **WANT** from the other side:

Variable	Opening	Final	Final

List the things you **DO NOT** want from the other side (what they want):

Variable	Opening	Final	Final

**Negotiation from Strength**

**Conditional Concessions**

Think it over! If you give it, how do you expect to receive your opening offer?

ROUND	If you give it.....	We will offer you.....
Opening offer		
Next potential offer		
Next potential offer		

**Conditioning** What statements do you use to condition the other side?

Area	Your conditioning statement

**Negotiation from Strength**

**Negotiation Progress Tracker** Use the table below to track the progress of the negotiation.

**Round 1**

Variable	Your offer	Their offer
Number of SKUs listed		
Number of Ratings per SKU		
Distribution - number of regions		
Distribution - number of Super		
Distribution - number of Convenience		
Number Locations in Core		
Investment in Super (in \$ mil)		
Investment in Super (in \$ mil)		
Investment in Convenience (in \$ mil)		

Notes

**Round 2**

Variable	Your offer	Their offer
Number of SKUs listed		
Number of Ratings per SKU		
Distribution - number of regions		
Distribution - number of Super		
Distribution - number of Convenience		
Number Locations in Core		
Investment in Super (in \$ mil)		
Investment in Super (in \$ mil)		
Investment in Convenience (in \$ mil)		

Notes

Negotiation is tough. Make sure you spend quality time preparing for it. An overview of the negotiation process can be found in your guidebook

# How to focus on great Execution

- 1 Prioritise activities and align internal and external resources behind your plan
- 2 Proactively and effectively forecast demand
- 3 Track and adjust your plan based on in-market and financial performance
- 4 Act quickly if things go off track

