KEY CUSTOMER MANAGER CHECK LISTS & TOP TIPS

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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

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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
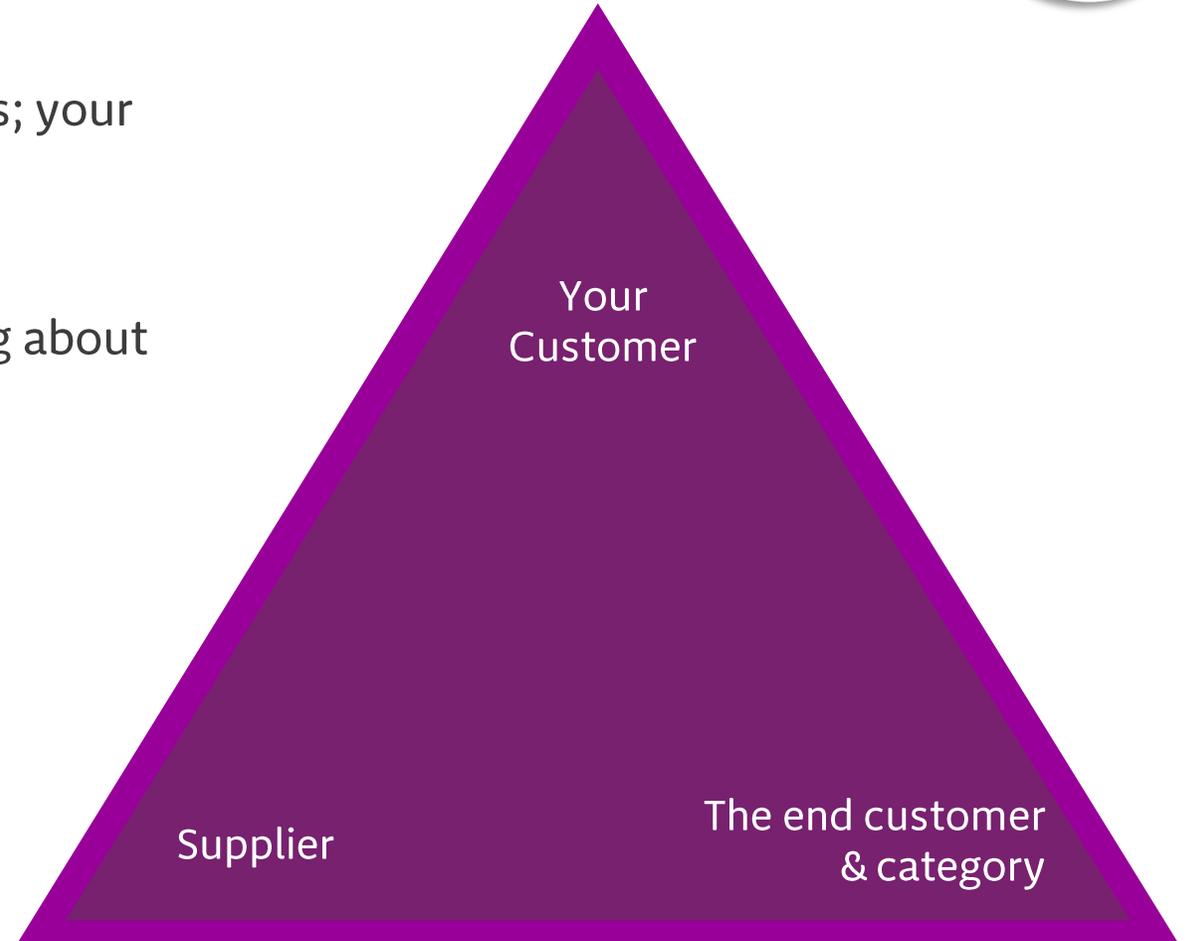
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Have a triple win mentality

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

Your Customer

Supplier

The end customer & category

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 ☐

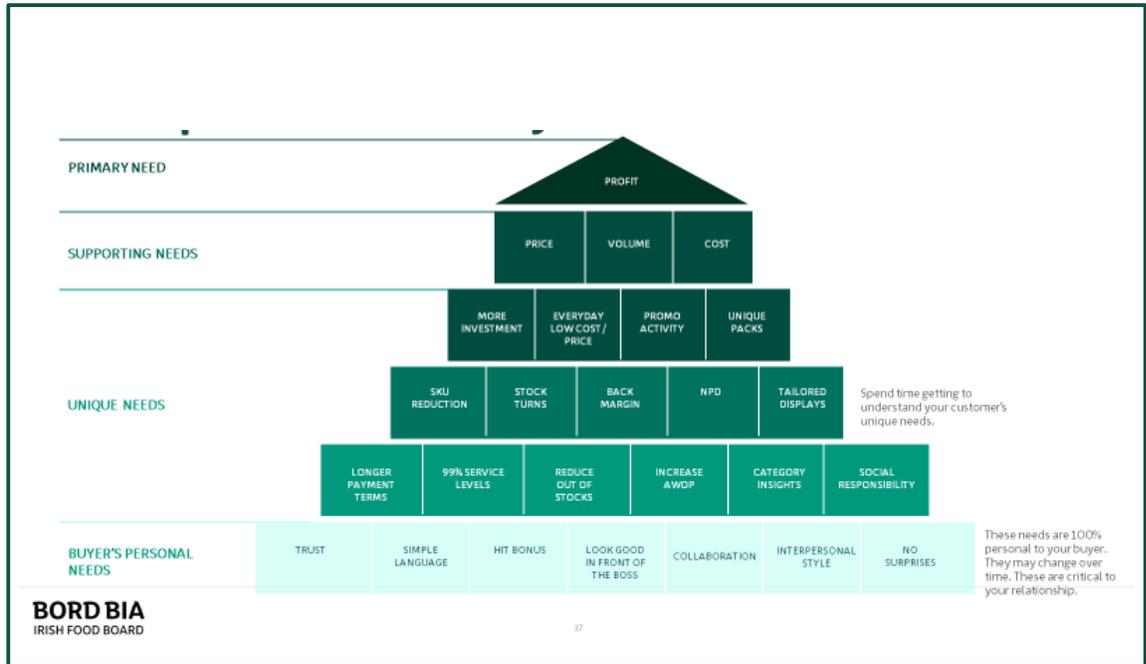**5** Use insight and foresight to determine where opportunities may come from ☐

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

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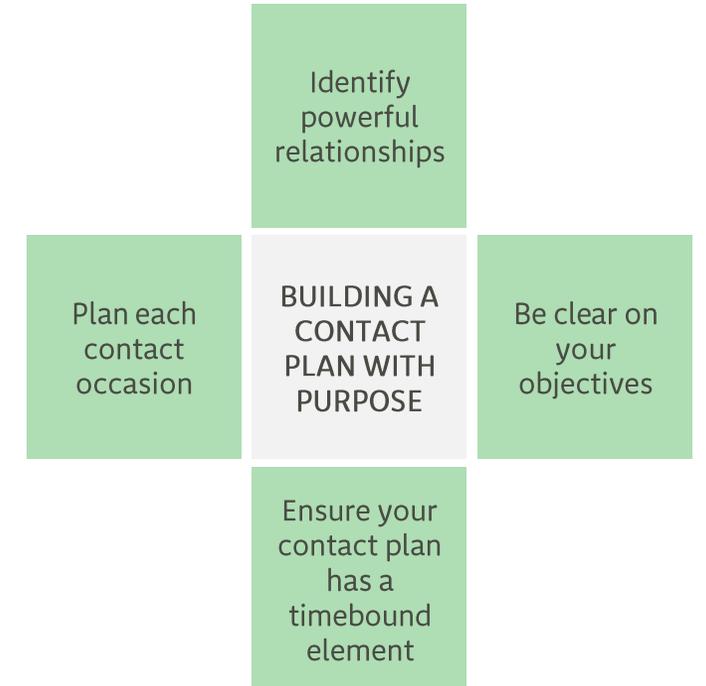
How to create a Trusted Partnership

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!

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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

Identify powerful relationships

Plan each contact occasion   **BUILDING A CONTACT PLAN WITH PURPOSE**   Be clear on your objectives

Ensure your contact plan has a timebound element

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

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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

```
1. Value baseline sales
        │
        ▼
2. Add factors to enhance
   baseline
        │
        ▼
3. Identify gap vs. goal  ──►  4. Pre-evaluate activities
                                        │
                                        ▼
                               5. Value incremental  ──►  6. Identify gap vs. goal
                                  activities                        │
                                     ▲                              ▼
                                     └──────────────────────  7. Iterate & optimise
```
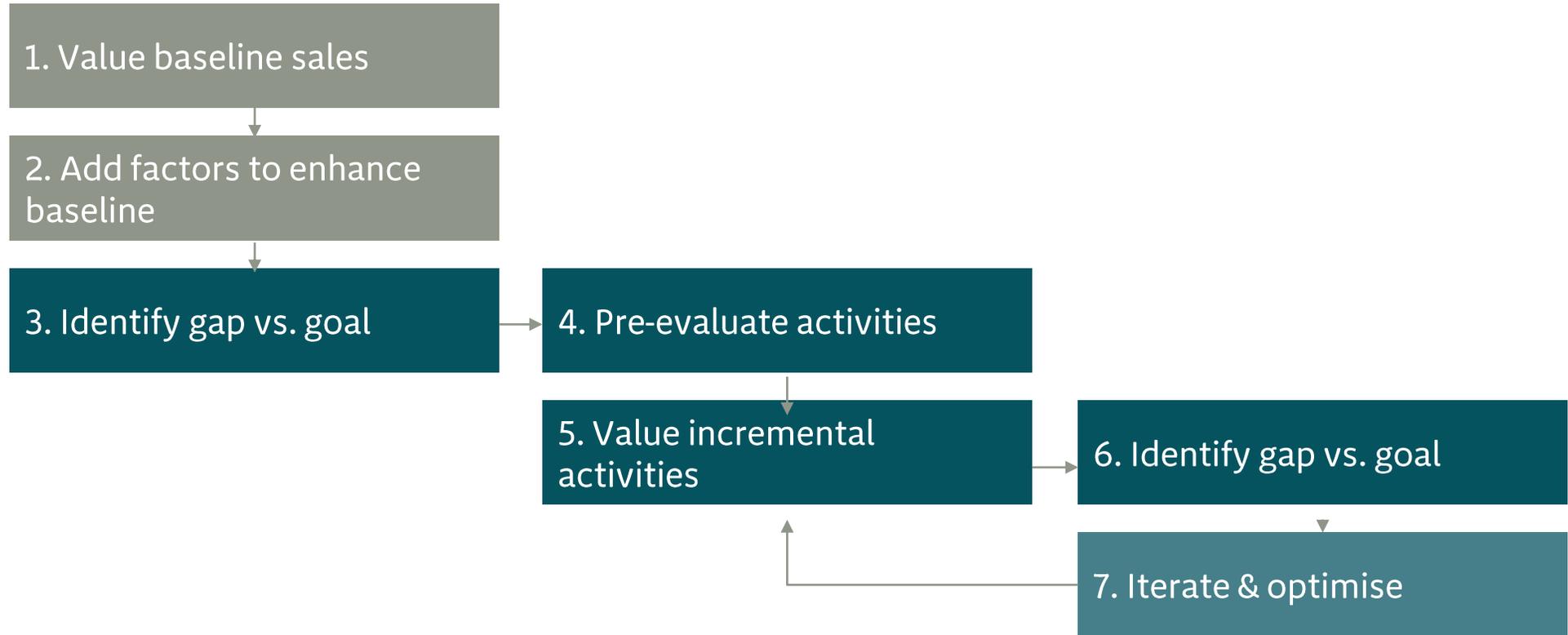
This iterative process will allow you to value your customer plan - whether you are in B2B or B2C. More information on how to do this can be found in the guidebook

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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

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The Selling Process

Specific, Measurable, Achievable, Realistic and Time Bound → **1 Your SMART Objective**

2 Summarise the Situation → Current Conditions
Customer Needs
Opportunities for Benefits
Confirm contact interest

Simple, Clear, Concise
Aligns with Customer Needs
Suggest action?
Benefit of your proposal ← **3 Big Idea**

4 How does it Work → Who does what, when, where?
Give assurance it's practical
Anticipate questions and objections
Ensure understanding
What is different or better about it?
Merchandising, pack, price, support

Reinforce that your idea gives them what they need ← **5 Reinforce Key Benefits**

6 Close → Trial, summary, assumptive, alternative closes

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

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

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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 ☐

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