

Often overlooked by many sales professionals is the opportunity to deepen and expand the relationship within existing accounts.

Critical Account Planning is a proven, account management program that teaches sales professionals how to plan for and maximize opportunity within existing accounts. This approach leads to stronger, longer-lasting relationships, improved customer loyalty and increased revenue.



### **Benefits of Critical Account Planning**

- **Successfully deepen and expand existing customer relationships** using a proven account management process
- **Approach accounts with consistency and precision**, resulting in more closed business and stronger customer relationships
- **Gain insight** into how to manage, organize, and analyze critical account information
- **Develop a relationship strategy** that skillfully aligns customer needs with opportunities
- **Carry account strategies forward** with tactical implementation plans to grow business



### **Quick Facts**

#### **Perfect for**

- Sales Professionals
- Sales Managers
- Sales Executives
- Sales Support Staff

#### **Workshop Length**

- 1-day or multi-day format

#### **Participant materials**

- Participant workbook
- Supporting worksheets & tools
- Job aides & reference guides
- Program certification
- Materials delivered print & digital

#### **Delivery Options**

- Instruction-led classroom
- Instruction-led virtual
- Train-the-trainer certification

Using real-world examples to illustrate key sales training concepts, the Critical Account Planning program fosters the development of research-based skills imperative for success in today's competitive marketplace.

### **Program Objectives of Critical Account Planning**

- **Apply the Critical Account Planning (CAP) framework** to key customer relationships
- **Identify the decision-making process** within key customer relationships
- Collect **critical information required to analyze accounts successfully**
- **Protect accounts by analyzing the competitive strengths and weaknesses** impacting customer relationships
- Create a plan to identify and work with **key account contacts**
- Plan and prioritize **next steps to drive the account management strategy forward**
- **Align customer needs** to account priorities and objectives

### **Maximize your sales training investment**

Leverage the full scope of Janek's solutions to drive immediate and long-term results.

#### **Customization**

Let us adapt this program for your team's specific needs, industry, sales environment, and culture.

#### **Measurement**

Validate training effectiveness in terms of performance improvement, business results, and ROI.

#### **Reinforcement**

Take advantage of our turn-key and hands-on training reinforcement solutions.

#### **Technology**

Use an innovative technology solution to reinforce training in a convenient and fun format.

**"Thank you for actively listening to our team's needs and for designing an innovative and effective solution that builds upon our existing strengths and provides a platform for continuous improvement. Our team emerged energized with deepened skills."**

**Cathy McCabe**  
Sr. Managing Director, TIAA



### **About Janek**

Janek is an industry-leading, award-winning sales performance company. We service clients of all sizes, from startups to the Fortune 100, and have applied our proven methodology to diverse industries and verticals. Top executives turn to Janek for innovative solutions to their most daunting challenges.

With Janek, thinking is shifted from what you sell to how you sell. How aligns with the fundamental way buying and buyers have changed. How listens and learns to adapt. How differentiates. Bottom line: how results in more business, more often. It's time to rethink how.

#### **Ready to get started?**

To schedule training for your organization visit [www.janek.com](http://www.janek.com) or call **800.979.0079**

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