SuperOffice webinar om Key Account Management

Lær mere om at arbejde med Key Account Management i SuperOffice.

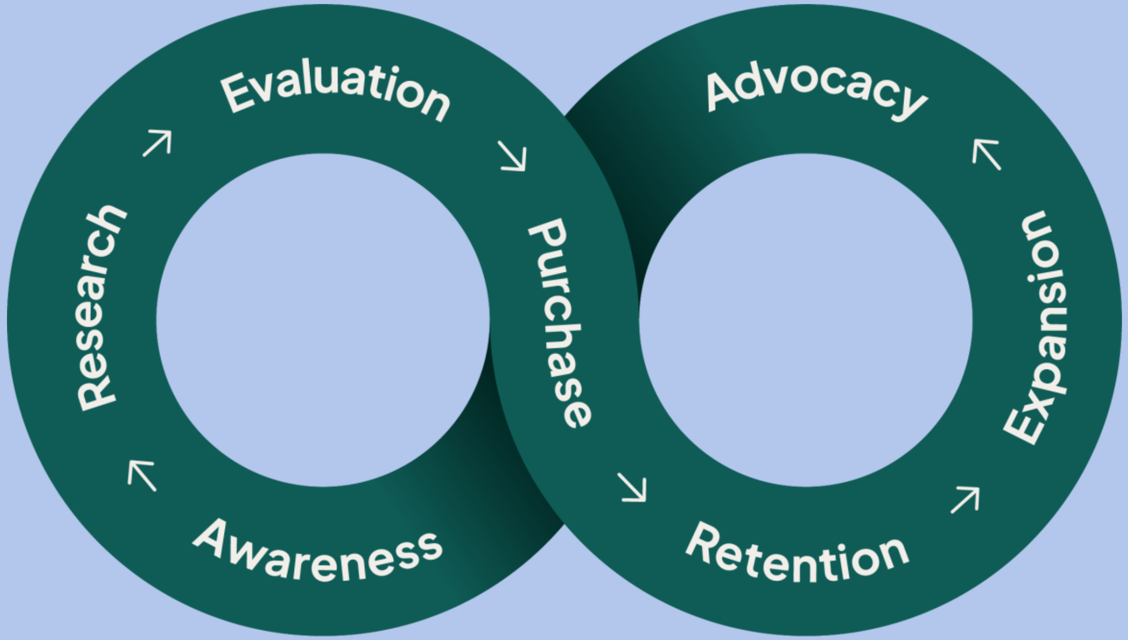
På webinaret i dag får du indsigt i, hvordan jeres arbejde med Key Account Management har de bedste forudsætninger i SuperOffice CRM.

Dine værter

🇩🇰 Jonas Kallan Langvad

Jan Andersen 🇳🇴

Et værktøj til at administrere hele kunderejsen



***Key Account Management** handler om at arbejde strategisk, struktureret og proaktivt med jeres nøglekunder — med en kundeplan som styringsværktøj til at skabe langsigtet, gensidig værdi.*

Key Account Management in CRM

Challenges

How to solve the challenges

Demonstrated through SuperOffice

What is Account management?

Account management is built on two key components

A long-term customer strategy

- Account management is a **strategic approach** focused on creating **long-term**, **value-driven** partnerships with key customers.
- It starts with a deep understanding of their **goals**, **challenges**, and **priorities**

Turning the strategy into results with the right tools

- To turn this strategy into real results, account managers need more than just good intentions — they need a clear plan on how to develop the customer..
- That's where an **account plan** is key.
- Instead of using static documents that are hard to keep updated, the most effective teams build their account plans **directly into the CRM**, making them part of a dynamic, flexible workflow that's always up to date and helps track progress and status.

Challenges solved with Account Mgmt

Difficult to gather **key account insights** and make it actionable for all in the organization.

Full overview of the opportunities on each key account and recommended **meeting cadence** based on profile ensures that nothing is left to chance.

Difficult to **prioritize account follow-up**, track progress, and identify new business opportunities effectively.

Account plans and Business Objectives available directly in the CRM (and not in dead documents), ensuring a dynamic, flexible workflow that's always up to date and helps track progress and status on key customers.

Lack of overview of customers and sales opportunities gives increased churn, missed opportunities. Also poor forecast predictability.

Full **overview of pipeline** and metrics, as well as **win/loss analysis** allows for optimization of forecasting and approach, increasing the win rate.

Due to **lack of focus and measurement,** there is a low activity level towards customers.

Dashboards for measuring activity (quality and quantity) ensures enough new sales processes are started.

Estimated Effect:
Reduced churn.
Increased cross/upsell.

Content of an Account plan

An Account plan is tool help strategically manage key customer relationships, drive revenue growth, and improve customer satisfaction.

Account plan Overview

Used to categorize customers into **profiles based on relationship status, growth potential, strategic value, or activity level.**

The profile help you plan how much effort to invest in each account and what kind of strategy to apply.

Key Contacts & Stakeholders

This provides an overview of the **key individuals** involved in the customer's organization, as well as the **internal team responsible** for managing and developing the relationship.

Upsell & Cross-Sell

Identify areas within the account where there's **potential for additional business** such as strategic growth potential through upsell and cross-sell

Meeting Plan & Activities

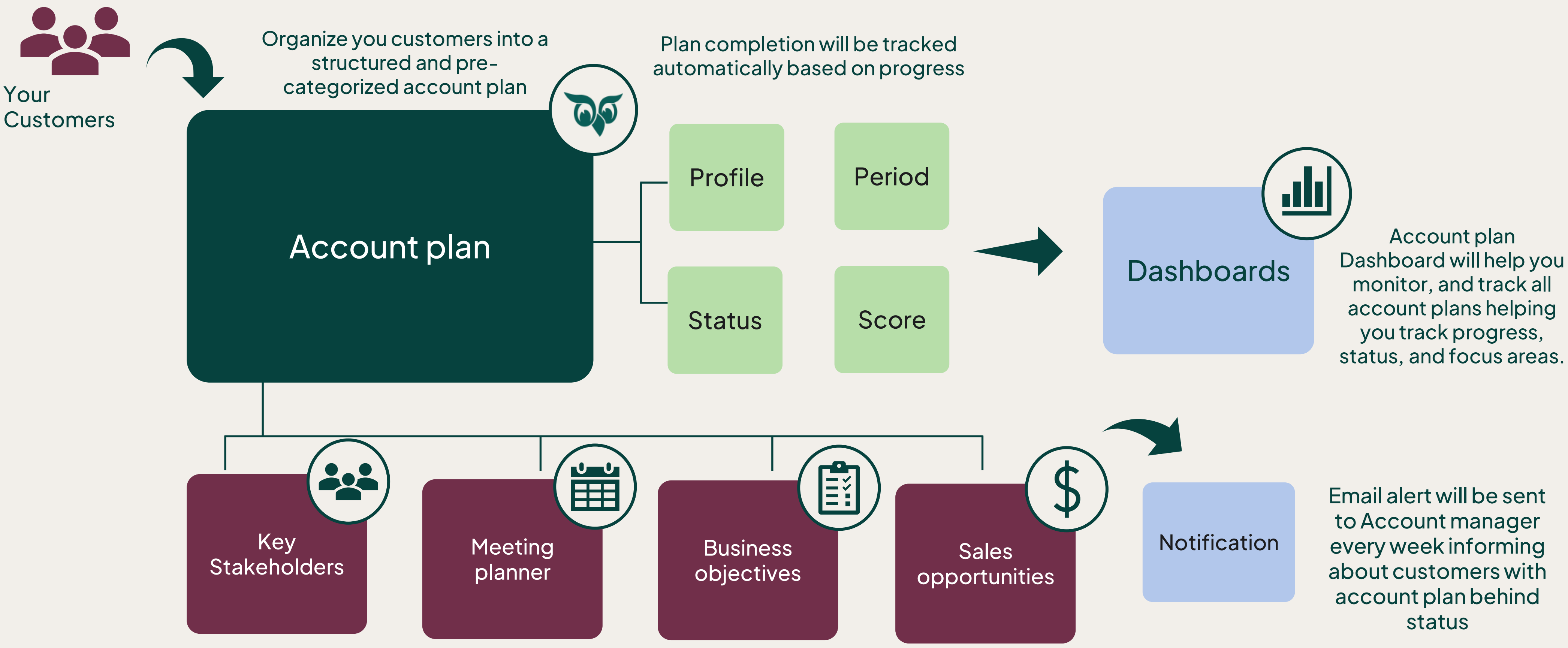
A **Meeting Plan** focus on the recommended frequency and type of interactions with the customer, tailored to their profile (e.g., retain or growth).

The plan ensures that key touchpoints are carried out consistently and proactively over time.

Business objectives

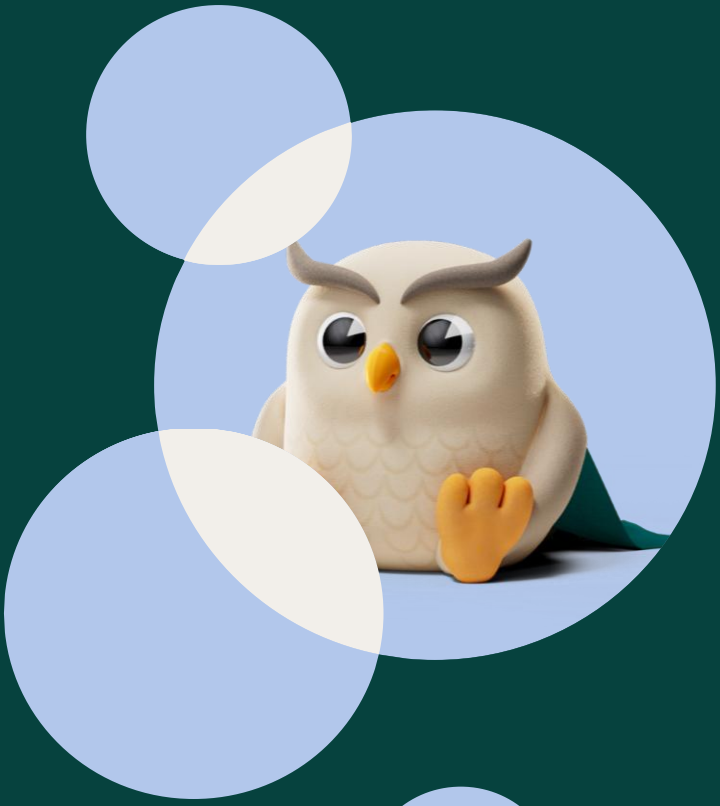
Key strategic or operational goals the customer is aiming to achieve. By identifying and documenting these objectives, we ensure that our engagement, solutions, and value proposition are aligned with what truly matters to the customer.

Account management



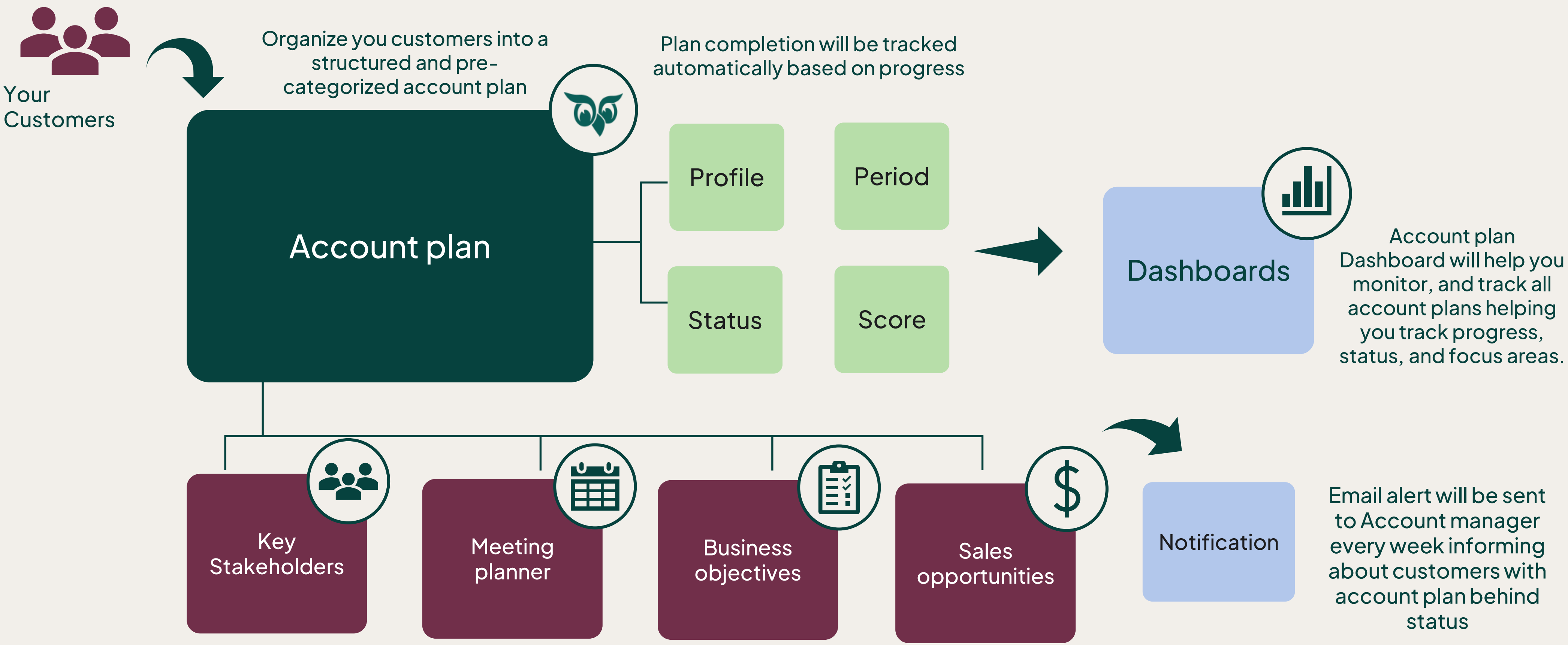
An account plan will gather key information about specific customers with possibilities to track progress, activities and business objectives.

SuperOffice



Demo

Account management



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SuperOffice

Hvis du vil vide mere

Kontakt din SuperOffice CRM Ekspert

Foranalyse

Tilpasning i jeres eksisterende løsning kræver, at vi undersøger den eksisterende opsætning først.

Dokumentation

Individuel oplæg til Account Management løsningen dokumenterer jeres muligheder for en succesfuld onboarding.

Endeligt oplæg til onboarding

Godkendelse af løsning og onboarding plan sikres i samrbejde med jer og jeres team.

SuperNotes

Before meetings

SuperNotes gives you a briefing with insights about the company and people you’re meeting, including shared connections and potential icebreakers.

During the meeting

SuperNotes records and transcribes your conversation automatically - whether you’re meeting online through Google Meet or Microsoft Teams or in person. You can focus fully on the discussion while SuperNotes captures key moments.

After the meeting

SuperNotes generates a clear summary with action points and pushes it directly to the correct spot in SuperOffice. Share a single link with transcript, and summary. SuperNotes also lets you chat with the meeting to extract insights, tailor your summary format, and get suggested CRM updates.

Kommende arrangementer

SuperOffice.dk/events

Webinar ”Gør møder til handling med SuperNotes”

Den 19. maj

Webinar ”AI og SuperOffice Copilot”

Den 10. juni

SuperOffice

Tak for i dag.