

Performing to New Heights



**Ginny
Carson**



How To Become an Overnight
Sensation with **Account Management**

October 27, 2015



SPAC 2015

Sensational Account Management

- Organizing the Chaos
- Capturing Information
- Launching the Team
- Briefing Leadership
- Pursuing Goals



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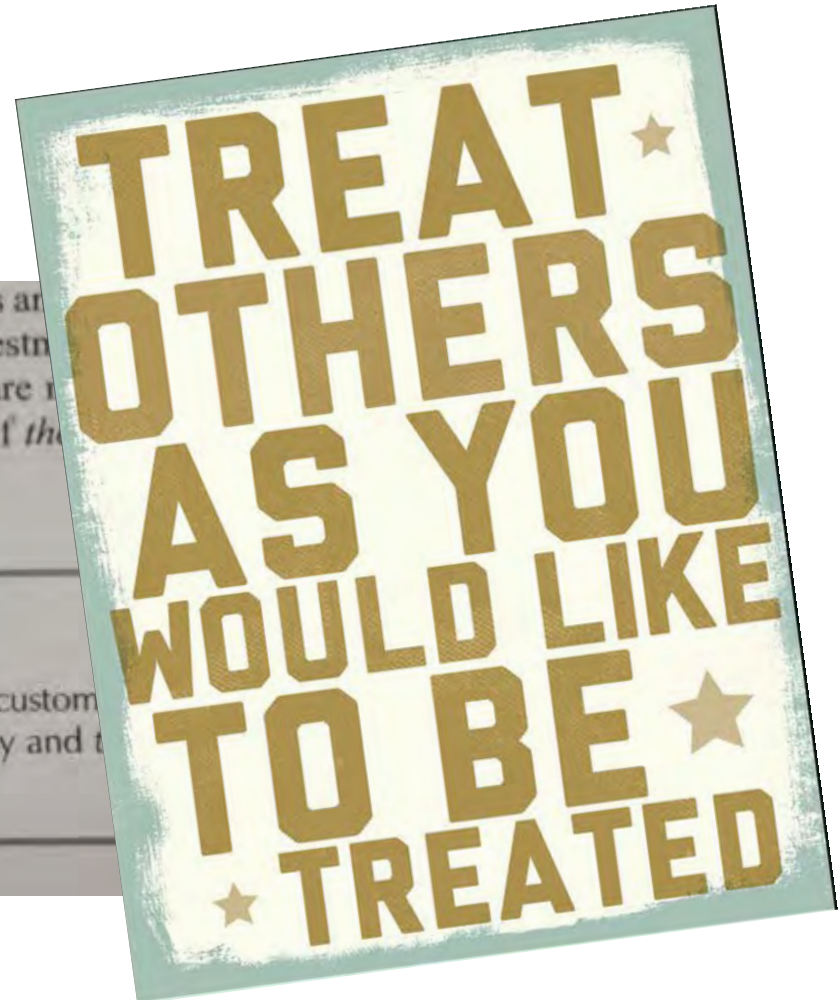
Sensational Account Management

- Create a Win – Win

One of the key insights we have gained from customers and that, to maintain a high return on your relationship investment, make it crystal clear to your major customers that you are not just an account for *mutual* advantage – for the robust growth of the

Basic Premise of LAMP

To achieve long-term profitable relationships with your key customers, make consistent, measurable contributions to *their* profitability and to the relationships.





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Sensational Account Management

- **Mature Accounts**





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Organizing the Chaos

- **Who is my customer?**
 - Contract Vehicles
 - Prime Contractors
 - Services Delivered
 - Technical Customers



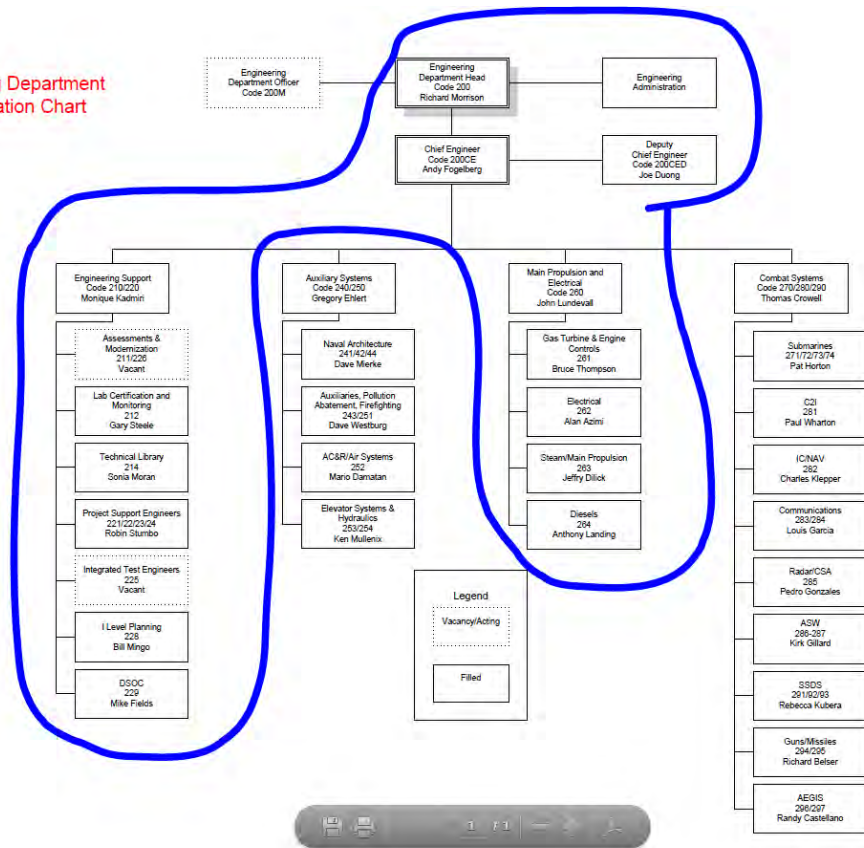


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Organizing the Chaos

- Find the Edges
- Field of Play

SWRMC Engineering Department
Code 200 Organization Chart





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Organizing the Chaos

- Suggested Approach
 - Annual Session to Review Account List
 - Engaged with all Parties – Leadership, BD, PMs, Operations
 - Posted plotter print-outs of Org Charts
 - Created a score sheet with weighted factors



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Organizing the Chaos

		Existing Business	Opportunities in Pipeline	Access to Contracts	Competitive Landscape	Relationships	Core Service Alignment	Healthy Market	Timing	TOTAL								
	weights	8	3	2	4	5	7	6	5									
Accounts																		
Owners																		
EXISTING		<i>Items scored on a scale of 1 - 5 (5 = most favorable conditions for LCE)</i>																
NEWFCB - [REDACTED]	Randy Reeves	5	40	4	12	5	10	2	8	3	15	5	35	5	30	5	25	175
NEWFCB - [REDACTED]	Randy Reeves	2	16	1	3	5	10	2	8	3	15	2	14	5	30	1	5	101
NEWFCB - [REDACTED]	Andy Mangrove	1	8	2	6	1	2	3	12	2	10	5	35	5	30	3	15	118
NEWFCB - [REDACTED]	Dick Bonnell	5	40	5	15	5	10	2	8	5	25	5	35	5	30	5	25	188
SERMAC - [REDACTED]	Dick Bonnell	4	32	5	15	5	10	2	8	5	25	5	35	5	30	5	25	180
[REDACTED]	[REDACTED]	4	32	5	15	3	6	2	8	3	15	4	28	2	12	4	20	136
SIN - [REDACTED]	Dick Bonnell	5	40	4	12	2	4	5	20	3	15	5	35	4	24	4	20	170
YHNS - [REDACTED]	Dick Bonnell	5	40	4	12	4	8	4	16	4	20	5	35	5	30	4	20	181
RONNY - [REDACTED]	[REDACTED]	4	32	3	9	4	8	4	16	4	20	5	35	5	30	4	20	170
NANSEA - [REDACTED]	Ed Godfrey	1	8	2	6	5	10	3	12	3	15	3	21	2	12	2	10	94
BBG - [REDACTED]	[REDACTED]	5	40	4	12	5	10	1	4	2	10	4	28	2	12	4	20	136
BBG - [REDACTED]	Randy Reeves	2	16	2	6	4	8	1	4	2	10	4	28	5	30	5	25	127
YHNS - [REDACTED]	Randy Reeves	3	24	1	3	3	6	1	4	2	10	2	14	4	24	4	20	105
NEW		weights																
[REDACTED]	Dick Bonnell	1	1	5	35	2	4	2	8	1	5	5	40	5	30	3	15	138
[REDACTED]	Ed Godfrey	1	1	4	28	3	6	2	8	2	10	5	40	5	30	3	15	138
NEW - Newport	Andy Mangrove	1	1	4	28	1	2	1	4	2	10	2	16	4	24	1	5	90
BBG - [REDACTED]	Ed Godfrey	1	1	5	35	2	4	1	4	2	10	4	32	5	30	4	20	136
BBG - [REDACTED]	[REDACTED]	1	1	4	28	3	6	1	4	3	15	5	40	5	30	3	15	139
[REDACTED]	Andy Mangrove	1	1	5	35	2	4	1	4	2	10	4	32	5	30	3	15	131
NEW - Carderock	Ed Godfrey	1	1	2	14	3	6	1	4	3	15	3	24	5	30	3	15	109
NEW - [REDACTED]	Ed Godfrey	1	1	3	21	1	2	1	4	2	10	2	16	5	30	2	10	94
BBG - [REDACTED]	Ed Godfrey	1	1	2	14	2	4	1	4	2	10	4	32	5	30	3	15	110
BBG - [REDACTED]	Ed Godfrey	1	1	3	21	1	2	1	4	2	10	2	16	5	30	3	15	99



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Capturing Information

- **Prepare, Plan and Execute**
 - About The Account
 - Mission/Purpose
 - Contracting or Buying Process
 - Decision Process
 - Trends
 - Opportunities
 - Key Contacts



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Capturing Information

- **Prepare, Plan and Execute**
 - About Our Team
 - Team Members
 - SWOT – Strengths and Vulnerabilities
 - Focus Investments
 - Stop Investments
 - Relationship Maps
 - Partners
 - Business History



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Capturing Information

- Suggested Approach
 - Assign Accountability for Collecting Information
 - Create a Central Storage Location for Information
 - Utilize existing infrastructure and tools



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Launching the Team

- Prepare, **Plan** and Execute
 - Goals
 - Charter Statement
 - Opportunities/Deals/Sales

Goals	Account Plan will be reviewed every other month by Account Team and updated as required
	Prime at least one contract (████) (██████████) (██████████ Systems) and be partner on all relevant Small Business opportunities
	Grow headcount by at least 15% each year
	Continue to grow within █████ Codes
	Establish and grow headcount in █████ Systems, █████ Codes, Code █████, Code █████ Strategic Planning and Administrative Support
	Estimated Account Revenue 2015: \$2,400,000
	Projected Revenue 2016: \$3,600,000
	Projected Revenue 2017: \$5,400,000
	Projected Revenue 2018: \$6,300,000



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Launching the Team

- Prepare, **Plan** and Execute
 - Goals
 - Charter Statement
 - Opportunities/Deals/Sales

Charter Statement

██████████ will have improved material condition, increased readiness and maintaince savings with LCE providing technical and assessment expertise at an affordable cost and we will receive continued growth within your organization.



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Launching the Team

- Prepare, **Plan** and Execute
 - Goals
 - Charter Statement
 - Opportunities/Deals/Sales

+ ADD NEW OPPORTUNITY | CHART PANE | RUN REPORT | EXPORT OPPORTUNITIES

✓	Name ↑	Account Type...	Owner	Sales Stage	Probability	Est. Revenue	Status Reason...	Est. Close Date
	[REDACTED]	Government	[REDACTED]	4 - Proposal Pla...	60	\$4,000,000.00	In Progress	2/29/2016
	[REDACTED]	Government	[REDACTED]	1 - Long-Term...	50	\$1,000,000.00	In Progress	9/28/2018
	[REDACTED]	Government	[REDACTED]	7 - Delivery/Up...	90	\$4,000,000.00	In Progress	9/11/2015
	[REDACTED]	Government	[REDACTED]	1 - Long-Term...	80	\$10,000,000.00	In Progress	12/1/2017
	[REDACTED]	Government	[REDACTED]	6 - Closing	70	\$630,000.00	In Progress	10/15/2015
	[REDACTED]	Government	[REDACTED]	4 - Proposal Pla...	60	\$500,000.00	In Progress	5/31/2016
	[REDACTED]	Government	[REDACTED]	7 - Delivery/Up...	100	\$300,000.00	In Progress	



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Launching the Team

- Prepare, **Plan** and Execute
 - Determine Frequency
 - Assign Read-Ahead Information
 - Call the Team Together



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Launching the Team

• Suggested Approach

Account Team Meeting Agenda

Organizational Changes in the Account

- People moving
- Standing-up or closing-out functions and roles
- Updates to ISW
- Updates to buy-sell hierarchy
- Communication plan updates
- Relationship updates
- SWOT updates

Opportunity Updates

- Pipeline movement (existing and new opportunities, category, strategy, and gate updates)
- Communication plan updates
- Relationship updates
- Industry day(s)

Competitive Landscape (Rumors and Intel)

Review Intel Bucket/Admin tab/Notes in the Account:

- Recent awards
- Updates to competitor bids
- Status of competitor performance

QAR Status

Issues and Solutions

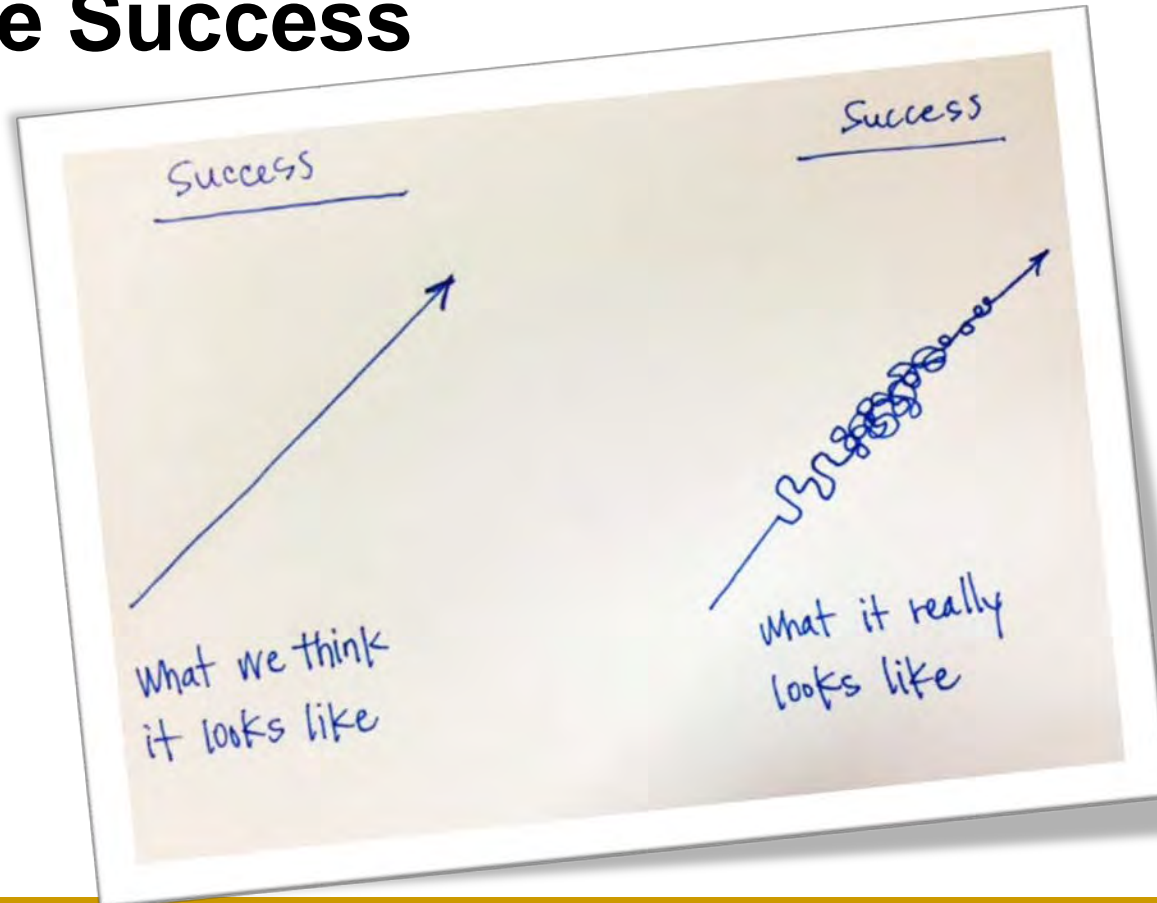
Action re-cap



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Briefing Leadership

- **Define Success**





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Briefing Leadership

- Utilize Existing Team Meetings
 - Goals
 - Revenue Targets
 - Strategic Partnerships
 - Relationships
 - Communication Plans
 - Opportunity Pipeline
 - Service Mix
 - Assessment



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Pursuing Goals

- Prepare, Plan and **Execute**
 - Work the Opportunities/Deals/Sales
 - Check in Regularly with Customer
 - Relationship Mapping
 - Communication Plans
 - Opportunity Progress through Pipeline
 - Check in Regularly with Account Team
 - Brief Leadership and ***Adjust as Necessary***



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Pursuing Goals



Have you qualified for your major?
Are you ready to declare?



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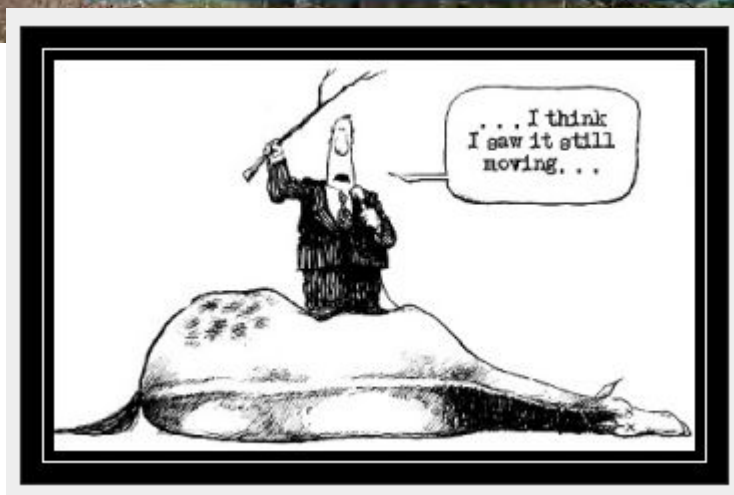
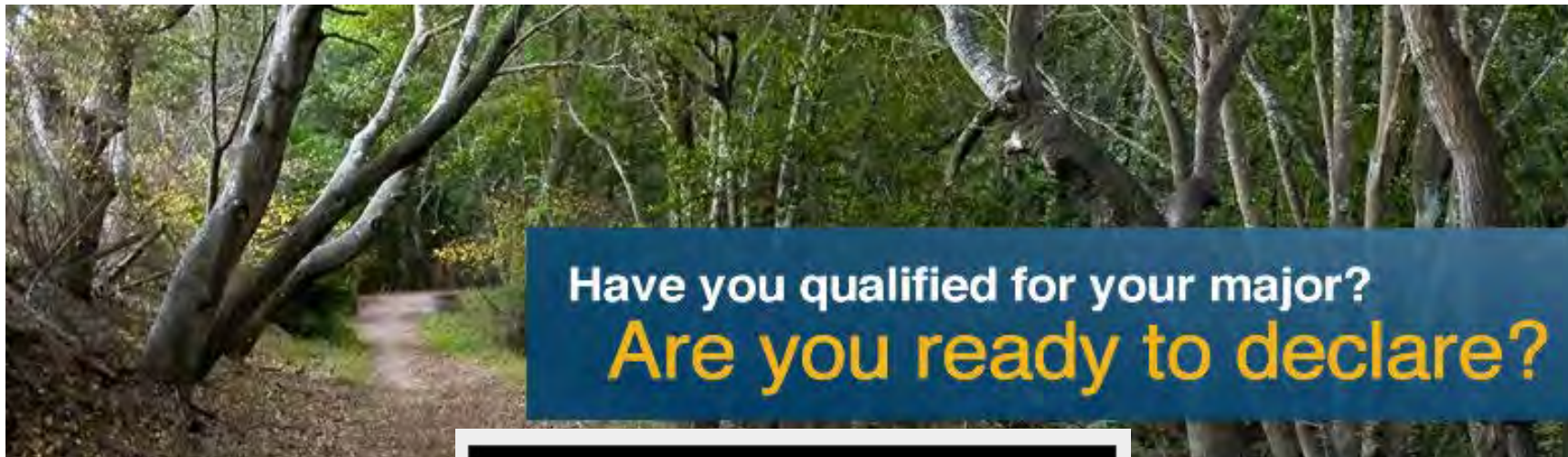
Pursuing Goals

TECHNOLOGY Digital Technology	IDTC Digital Technology Computing IDTI Digital Technology Information Business Administration and Computing IBAC	2DTC Digital Technology Computing 2DTI Digital Technology Information Business Administration and Computing 2BAC	3DTC Digital Technology Computing 3DTI Digital Technology Information Business Administration and Computing 3BAC
Hard Materials	IGRA Graphics & Design Engineering Furniture Making Technology Carpentry IFMG ITEC IELE	2GRA Graphics & Design Engineering Furniture Making Technology Carpentry 2TEG 2TEC 2ELE 2MTW	3GRA Graphics & Design 3ELE Electronics
Soft Materials	IHOE Home Economics Food Technology ITEF ITES	2TEF Food Technology Fabric Technology Hospitality Childcare 2HOS 2CCE 2WAC	3TEF Food Technology Fabric Technology Hospitality Childcare 3HOS 3CCE
ENGLISH	IENG English IENT English Literacy ILIT	2ENG English 2ENV English with Media Studies 2EMS	3ENG English 3ENV English with Media Studies 3EMS
LANGUAGES	IMRI Te Reo Māori IFRE French* IJPN Japanese* IGER German* (*All languages except Te Reo Māori are studied via Correspondence. Level 1 correspondence will incur a fee of \$1,200 per student)	2MRI Te Reo Māori 2FRE French* 2JPN Japanese* 2GER German* 2MAC Mathematics & Statistics with Calculus 2MAS Mathematics & Statistics	3MRI Te Reo Māori 3FRE French* 3JPN Japanese* 3GER German* 3MAC Mathematics with Calculus 3MAS Mathematics & Statistics
MATHEMATICS & STATISTICS	IMAE Mathematics & Statistics Extension (Internal Assessment) IMAS Mathematics with Numeracy IMAN	2MAE Mathematics & Statistics Extension 2MAE	3MAE Mathematics & Statistics Extension 3MAE
OUTDOOR EDUCATION	IOED Outdoor Education	2OED Outdoor Education	3OED Outdoor Education
HEALTH & PHYSICAL EDUCATION	ISSC Sports Science Sport and Recreation Studies ISRS IHILH Health	2SSC Sports Science Sport and Recreation Studies 2SRS 2SPE Senior Sports Elite 2HILH Health Life Skills 2BIO Biology 2CHE Chemistry 2PHY Physics 2SCI Science	3SSC Sports Science Sport and Recreation Studies 3SRS 3HILH Health 3BIO Biology 3CHE Chemistry 3PHY Physics 3SCI Science
SCIENCE	IBIO Biology Science ISCG ISCT Science (Internal Assessment) Practical Science ISCP	2BIO Biology 2CHE Chemistry 2PHY Physics 2SCI Science 2AGR Agricultural Science	3BIO Biology 3CHE Chemistry 3PHY Physics 3SCI Science 3AGR Agricultural Science
AGRICULTURAL SCIENCE/ACADEMY	IAGR Agriculture Academy IAGA Horticulture IHRP IACC Accounting Economics & Business Studies IEBS IGEO Geography ISIS	2AGR Agricultural Science 2ACC Accounting Economics 2ECO 2GEO Geography Social Issues 2SIS 2TTR Tourism & Travel	3AGR Agricultural Science 3ACC Accounting Economics 3ECO 3GEO Geography Social Issues 3SIS 3TTR Tourism & Travel



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Pursuing Goals





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Sensational Account Management

- Organizing the Chaos
- Capturing Information
- Launching the Team
- Briefing Leadership
- Pursuing Goals



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Sensational Account Management

A dark grey chalkboard with the text 'any questions?' written in white chalk. The text is centered and occupies most of the board's width. At the bottom of the board, there's a wooden ledge with a piece of red chalk and a black eraser.



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Sensational Account Management



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