

# Account Planning & Mgt. Remotely

*Effective development of Key Accounts despite of travel bans and budget cuts*

*Do your Key Account Managers struggle with the consequences of quarantine measures, travel restrictions and budget cuts? Do you feel they should receive even more support than before? Then you may want to think about virtualizing your Key Account planning and management:*

- *Remote planning and management can be even more effective and sustainable than on-premise measures.*
- *They are less intrusive and more economical.*
- *They can provide even more guidance and handholding.*

NewLeaf's remote Key Account Planning and Development framework is minimally invasive and fully integrated with salespeople's daily work. It combines the advantages of instructor-led programs and online channels to create effective Key Account strategies that drive results – both for the salesforce and for its customers.

## *Three guiding principles ensure program effectiveness and sustainability*

Remote programs allow **more frequent interaction** than do monolithic on-site trainings. They allow to **include extended teams** without the usual hassles and travel costs. Furthermore, our instructors can provide continued guidance and **support to each individual** at comparatively **low cost**.

Our work is based on three guiding principles to ensure that participants apply the learnings in their daily job life:

### 1. Experience-based learning

Learning is effective when participants can convert theoretical knowledge into practical application. Short sessions and easy to digest content **followed by on-the-job assignments** allow for **immediate application in the real world**. In contrast to in a classroom training, this approach allows instructors to observe how each participant applies the new knowledge in the field.

### 2. Peer learning

Numerous studies have proven that employees acquire and apply knowledge best when it is provided by a source that they trust. **Colleagues are regularly the source employees trust the most**. The program therefore focuses on learning from and with colleagues through the peer reviews and peer learning sessions.

### 3. Drip-feeding of information

It has been proven that the success of an intervention increases if the content is offered in **small, bite-size**

**chunks**. This is something that is difficult or even impossible to implement in classroom training due to the high costs involved. However, when using remote channels, the content can be efficiently conveyed in very small units (15 to 30 minutes) that can be applied immediately in the field.

## *Illustrative example*

Initial screening of participants' existing plan & strategy



Initial WebEx: intro to program & initial content



Specific parts of the plan are re-worked/prepared by participants



Facilitated peer review of assignments or asynchronous review (Teams / email)



1:1 remote coaching sessions



One iteration of preceding steps for each part of the plan



Joint remote After Action Review / Lessons Learnt



*Contact us to learn more:*

NewLeaf Partners Europe GmbH | Dr. Michael Scherm  
T: +49 (0)171 870 2839 | E: m.scherm@newleafpartners.com