Appendix C

Customer Action Plan Guide

In complex business propositions, key account-based marketing plays an important role in expanding business with existing customers. The customer action plan should describe how you intend to interact with customers to achieve a specific action in a mutually satisfactory way. The information you compile on any given customer establishes a solid foundation for more effective interaction with the key account.

This guide is simply a tool to get you started on compiling customer information. In most cases, it describes the minimum amount of data found to be useful in working with key accounts. This data should be kept in electronic formats that are easy to search.

Section 1: Executive Summary (1 page)

- High-level overview of key account profile
- Relationship with the key account
- Marketing strategy highlights
- Financial and personnel requirements for the key account program
- Major goals and timeline for the key account
- Barriers to success with the key account

Section 2: Key Accounts Contact Profile (1 page per contact)

- Names and contact data for each contact in the organization
- Office phone and fax, mobile phone, pager, email, and preferred method of contact
- Decision-making capability, magnitude, and prerequisites
- Non-business information such as hobbies, sports, spouse's name, etc.
- Contact history

Section 3: Key Account Business Profile (1 page)

- Business description
- Product lines, target markets, main competitors, years in business, number of employees, and North American Industry Classification System (NAICS) code
- Industry description and trends
- Trade associations
- Website
- How the customers make money and key drivers to their profitability
- Customer core issues by priority and drivers for these issues

Section 4: Energy Use and Key Account Equipment Description (1–2 pages)

- Consumption history with load profiles for electric, water, and gas
- Percentage of energy cost as a function of total facility costs

- Load and power factors
- Analysis of customer's energy consumption showing percentages of utility's total end-user consumption
- Rate comparisons for last three years
- Transformer maintenance data
- Internal equipment descriptions
- Power quality needs and equipment
- One-line diagram from substation/transmission to facility
- Outage reports
- Billing and payment history
- Forecast of power requirements

Section 5: Relationship Analysis (1–2 pages)

- What is the relationship between the customer and the utility?
- What needs to be changed in the current relationship?
- What is the desired long-term relationship?
- What is the contact history with the key account?
- Who is, or has been, the principal contact point for the utility?

Section 6: Communication Strategies for Key Account (1–2 pages)

- Other communication channels, in addition to direct contact, that will be used with the key account. Channels should include people in other departments the key account representative will have to rely on for reference materials and support.

Section 7: Goals for Account (2–3 pages)

- Short- and long-term goals and objectives for this customer with as much detail as possible
- Why achievement of these goals would be good for your customer
- Alternatives proposed and/or reviewed by the customer—include any competitor offerings
- How this service/product blends with your core business
- What you're going to do next and when it will be completed

Section 8: Financial and Budget Requirements (2–3 pages)

- The financial resources required to pursue this opportunity. The financial analysis should be conducted with enough detail to secure funding for this project from external resources
- Expansions in personnel, equipment, and facilities that will be required to deliver this service/product

Section 9: Barriers to Success with Key Account (1–2 pages)

- Internal barriers that may prevent success with this key account
- External barriers that may prevent success with this key account
- How does this key account rank in your utility's priorities?