

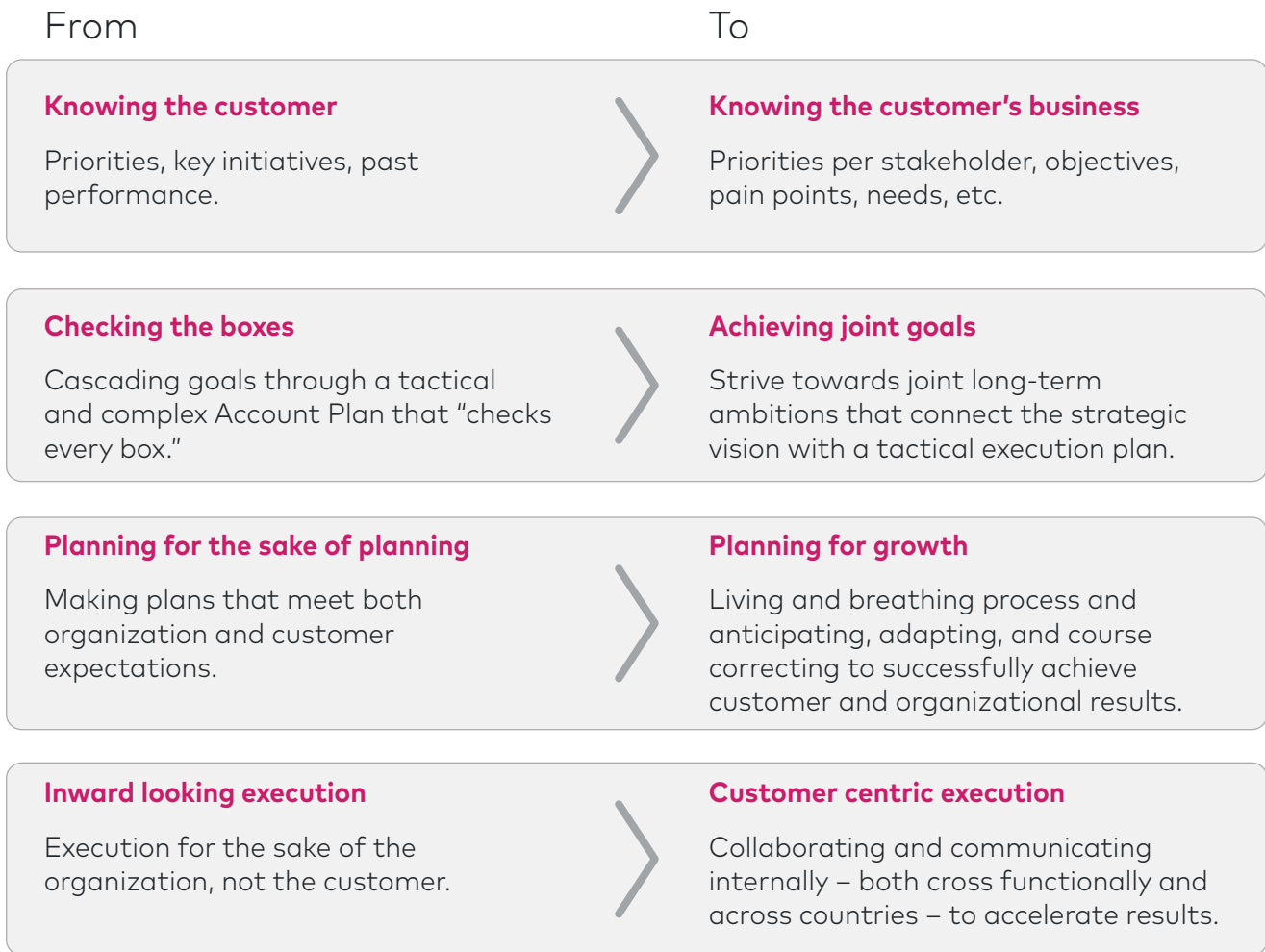


# Leveling up customer business planning to **ACCELERATE GROWTH**

Facing a competitive market, the European division of a leading international food and beverage organization recognized the need to upskill its key account managers (KAMs) and their teams. To continue to win business, KAMs needed to have a deep understanding of their customers, with strong customer business planning capabilities. This would require alignment throughout the entire commercial leadership organization, effective collaboration across regions and functions, and ensuring the customer was at the heart of every decision. In service of this goal, the organization partnered with BTS to help its KAMs make the critical shifts needed to bring this customer-centric vision to life.

# SOLUTION

Together, BTS and the organization conducted a series of intensive interviews with leaders in the organization to uncover the critical shifts needed to unlock the next level of customer excellence. Through this effort, BTS and the organization identified that leaders needed to make the following shifts:



Toward this end, BTS and the organization collaborated to create a customized nine-week journey. The journey would leverage a moments-based simulation that enabled KAMs to test out the new customer-centric behaviors as if in real life. Throughout the nine weeks, leaders would experience:

1. **A project kick-off call**, which presented participants with an outline of the journey and cultivated intentionality for the program as well as gather their expectations and key challenges, to ensure the right focus for each cohort .
2. **In-person sessions** over the course of two days, which enabled leaders to walk a mile in their customer's shoes and go deep on customer business planning. These sessions featured a customized, moments-based business simulation where KAMs played the role of both the customer and the KAM to give them a better understanding of their customer's perspective. During the simulation, KAMs went through moments they would typically experience in their daily work, test-driving the new customer-centric approach by making decisions in a risk-free environment modeled directly after their role. KAMs also engaged in role-plays to act out the new behaviors. The organization's executives gave feedback to the KAMs on their performance in the role plays, enabling the executive leaders to see their teams in action and for the KAMs to understand the critical importance of this development initiative.
3. **Three virtual sprints** held in the flow of work, where leaders would collaborate in teams to revisit their real customer account plans, honing their skills by:

1

Building a shared vision

2

Creating a strategic and tactical plan

3

Developing an approach to execute the plan

Engaging participants in the virtual sprints in their daily work prevented them from being taken out of the business and helped KAMs to embed the new customer business planning into their ways of working.

4. **1:1 coaching calls**, during which leaders explored what they had accomplished in the account planning virtual sprints, gained insight into their personal strengths and challenges, and unlocked strategies for growth. These sessions ultimately helped to reinforce the learning and behavior shift from both the in-person sessions and the virtual sprints.

Over the course of two years, the journey would reach all KAMs in the organization, spanning nine European regions.

# RESULTS

Since the program's kick-off, 324 participants in 18 cohorts have been through the program with approximately 150 more set to attend. As a result of the program, they have achieved the following results:

**89%**

of participants agree or strongly agree that they feel more confident at putting the **customer at the center** of their decision-making.

**92%**

of participants agree or strongly agree that they feel more confident in revisiting, adapting, and course correcting their plans.

**89%**

of participants agree or strongly agree that they feel more confident in collaborating internally and externally.

**94%**

of participants agree or strongly agree that they feel more confident in defining and co-creating joint long-term ambitions.

## Leaders also reported the following changes in behavior:

Before the program, account managers revisited their account plans:

**Weekly: 14 percent**

**Monthly: 35 percent**

**Quarterly: 50 percent**

**Never: 10 percent**

During the nine-week program, account managers revisited their account plans:

**Four times: 69 percent**

**Three times: 85 percent**

**Two times: 90 percent**

**Once: 100 percent**

Indicating that 100 percent of account managers were revisiting their account plans quarterly and 90 percent were revisiting them monthly.

As a result of these shifts, the organization has created a new standard for consistency around business planning as well as a lasting legacy that will enable the organization to continue with customer-centric business planning far into the future.