DEALCRAFT ADVISORY

THE ACCOUNT LEADER'S TOOLKIT

# Lead the Account Like a Business.

Seven working tools for turning a well-served account into a growing one. Built from three decades in the field, tested against the research.

For Client Partners, Account Directors and Account Leaders at technology services firms and systems integrators, and the sales leaders who coach them. Print it, fill it in, bring it to your next account review.

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BEFORE YOU START

# This is a workbook, not a reading list.

Every tool in here exists because, at some point over the last three decades, we watched an account stall for want of it.

The article that sent you here covers the why. This toolkit covers the how. Pick one account, the one that matters most to your number this year, and work through the tools in order. Each one takes between twenty minutes and an afternoon. Together they produce an account plan you can defend in front of your leadership and, more importantly, in front of the client.

| | |
|---|---|
| 0 | **Where are you now?** A four-stage diagnostic for the account. |
| 1 | **The account P&L on one page.** The numbers a business owner would want to see. |
| 2 | **The white-space map.** Where you are, where competitors are, and where nobody is yet. |
| 3 | **The growth hypothesis.** One sentence that turns an idea into a conversation. |
| 4 | **The question ladder.** Four rungs from "what do you need?" to "what would it take?" |
| 5 | **Challenge without damage.** A five-step way to disagree with a client and keep the relationship. |
| 6 | **The review the client wants to attend.** A 60-minute agenda that is about their business, not your SLAs. |
| 7 | **The 90-day sprint and the scorecard.** Turn the plan into dates and owners, then score yourself again. |

> **A NOTE FROM EXPERIENCE**
>
> The hardest part is not filling the tools in. It is being honest about the answers. The accounts that grew fastest for us were the ones where the team first admitted how much of last year's revenue simply arrived.

TOOL 0 · DIAGNOSE

# Which account are you actually running?

Most accounts sit in one of four stages. The signals below are the ones we have learned to look for in an account review, because they show up long before the revenue numbers do. Mark the stage that best describes your account today, not the one in last year's plan.

### 1. Custodian

Looked after well, grows only when the client decides.

SIGNALS

Most pipeline arrives as RFPs. Meetings are with the same two or three people. QBRs report SLAs.

### 2. Preferred supplier

Trusted to deliver, invited to bid.

SIGNALS

Early sight of RFPs. Good references. Still competing on price for each new piece of work.

### 3. Adviser

Asked for a view before decisions are made.

SIGNALS

Invited into planning. Some single-source work. Relationships reach the C-suite but not every business unit.

### 4. Growth partner

Shapes the client's agenda alongside them.

SIGNALS

Most pipeline is originated. Joint targets and investment. Client brings you problems before budgets exist.

## The three questions that place you

| QUESTION | YOUR ANSWER |
|---|---|
| Of the new business signed in the last 12 months, what share did **we originate** (raised the idea before the client asked)? | |
| How many of the client's **top ten business priorities** for this year can the team name without looking them up? | |
| When did a **client executive last call us first** about a problem that did not yet have a budget? | |

**What we typically see:** teams place themselves one stage higher than the evidence supports. If origination is under a third, treat yourself as stage 1 or 2, whatever the satisfaction scores say.

TOOL 1 · OWN THE NUMBERS

# The account P&L on one page.

If you ran this account as a standalone business, these are the lines your investors would ask about. Most account plans we review have the first two lines and none of the rest.

| LINE | THIS YEAR | NEXT YEAR (PLAN) | WHERE THE DATA COMES FROM |
|---|---|---|---|
| **Revenue run-rate** | | | Finance, contracted + forecast |
| **Revenue at risk (renewals, ends of term)** | | | Contract register, next 18 months |
| **Gross margin %** | | | Delivery finance, by contract |
| **Cost to serve (pre-sales, account team, bids)** | | | Time and bid cost records |
| **Share of wallet (our spend / client's total in our categories)** | | | Client IT budget, annual report, procurement |
| **Pipeline originated by us** | | | CRM, tagged by source |
| **Pipeline received (RFPs, client requests)** | | | CRM, tagged by source |
| **White-space value (from Tool 2)** | | | Your estimate, stated as a range |
| **Investment asked for (people, pilots, funding)** | | | What you need to unlock the plan |
| **Return on that investment** | | | Margin from originated deals / investment |

**THE LINE THAT MATTERS MOST**

The split between originated and received pipeline. It is the clearest single measure of whether the account is being led or simply served.

**THE LINE MOST OFTEN MISSING**

The investment ask. A business owner asks for capital to grow. Account leaders who never ask for anything signal that they do not expect anything.

TOOL 2 · FIND THE SPACE

# The white-space map.

List the client's business units or regions down the side and the capabilities you sell across the top. Mark each cell. The example below is for a manufacturing client part-way through an SAP programme; replace it with your own.

| BUSINESS UNIT | FINANCE | SUPPLY CHAIN | HR | CUSTOMER / CX | DATA & AI | RUN / AMS |
|---|---|---|---|---|---|---|
| **Group / HQ** | O | I | C | W | W | O |
| **Europe** | O | O | C | W | W | O |
| **Americas** | C | C | C | I | W | C |
| **Middle East** | W | W | W | W | W | W |

**O** ours · **C** a competitor's · **I** done in-house · **W** white space: nobody, yet

## How to read it

1. **Columns that are mostly O** are your credibility. Use them as references for the cells next door.
2. **Rows that are mostly C** are where a competitor is leading the account. Ask what they know that you do not.
3. **Clusters of W** are where growth usually comes from, and where nobody has yet framed the problem. That is your opening.
4. **Cells marked I** are often the most interesting. In-house teams under pressure become partners if approached as allies, not replacements.

**From the field:** the biggest growth we have seen rarely came from winning a competitor's cell. It came from a white-space cluster that nobody had looked at, because nobody had been asked to.

TOOL 3 · TURN IDEAS INTO CONVERSATIONS

# The growth hypothesis.

An account plan full of "explore opportunities in supply chain" goes nowhere. A hypothesis is specific enough to be wrong, which is exactly what makes a client engage with it. Write one for each white-space cluster.

> We believe client / business unit could business outcome worth value range by change we would make together , because evidence we have . We would test this by small, low-risk next step .

## A worked example

> We believe **the European business** could **close the books three days faster** worth **roughly 1,500 finance hours a year** by **standardising the close on S/4HANA before ECC mainstream maintenance ends in 2027**, because **their Group finance team already runs a faster close on the processes we implemented**. We would test this by **a two-week close diagnostic with the European controller, at our cost**.

## Five checks before you take it to the client

- ☐ 01 **Is the outcome theirs?** Stated in the client's KPIs, not your service lines.
- ☐ 02 **Is the value a range you can defend?** Show the arithmetic, keep it conservative.
- ☐ 03 **Is the evidence from inside this client?** One internal proof point beats three external case studies.
- ☐ 04 **Is the next step small enough to say yes to today?** A diagnostic, a workshop, a data sample. Not a proposal.
- ☐ 05 **Would you be comfortable being wrong?** If the client corrects you, you have learned something a competitor does not know.

TOOL 4 · ASK BETTER

# The question ladder.

Most account conversations stay on the bottom rung. Each rung up surfaces a different kind of opportunity. The research on question-asking suggests people consistently underestimate both how much a good question is appreciated and how often a direct ask gets a yes. In our experience, it is the third and fourth rungs that clients remember.

| RUNG | WHAT IT SURFACES | QUESTIONS TO TRY |
|---|---|---|
| **1. Requirement** | Today's request | "What do you need from us on this?" "When do you need it by?" |
| **2. Context** | Why it matters now | "What changed that made this a priority?" "Who else is affected if it slips?" |
| **3. Ambition** | Where they want to be | "If this went better than planned, what would be different in two years?" "What does your CFO wish this could do?" |
| **4. Commitment** | What it would take to act | "What would it take to start this quarter?" "What would you need to see from us to put this on the board's agenda?" |

## Three habits that make the ladder work

1. **Follow up before you move on.** The second question on the same topic ("tell me more about that") is where the real answer usually is.
2. **Climb one rung per meeting.** Jumping straight to rung 4 with a new stakeholder feels like a sales pitch. Earn it.
3. **Write down the answers verbatim.** The client's own words become the opening line of your growth hypothesis and, later, your proposal.

**From the field:** the most valuable question we ever asked in an account review was a rung-4 question the account team had assumed the client would refuse. They did not.

TOOL 5 · CHALLENGE WITH CARE

# Challenge without damage.

Challenging the status quo is not the same as telling a client they are wrong. Done badly, it costs the relationship. Done well, it is the reason the client keeps inviting you back. These five steps are the ones we have seen work, in sequence.

| | |
|---|---|
| 1 | **Earn the right.** Deliver flawlessly on the current work first. A challenge from a supplier who is late on today's deliverables is just noise. |
| 2 | **Lead with their data, not your opinion.** "Your close takes eleven days; your peers average six" lands. "We think your finance process is inefficient" does not. |
| 3 | **Reframe, then pause.** State the cost of staying as they are, then stop talking. Let the client fill the silence. |
| 4 | **Offer two or three paths, not twelve.** Too many options with no clear recommendation is how good ideas end in "let's revisit next year". Make a recommendation. |
| 5 | **Own part of the risk.** A pilot at your cost, a shared milestone, a fee tied to an outcome. It shows you believe your own argument. |

## Prepare the challenge on one page

| |
|---|
| **What the client believes today** |
| **What the data shows instead** |
| **The cost of staying as they are** |
| **Our recommended path** |
| **The risk we will share** |
| **Who must hear it first, and who must not hear it second-hand** |

TOOL 6 · MAKE IT JOINT

# The review the client wants to attend.

A quarterly review built around your SLAs is a meeting the client delegates. One built around their business is a meeting their executives make time for. Here is the 60-minute agenda we recommend.

| MINUTES | ITEM | WHO LEADS |
|---|---|---|
| 0 to 10 | **Their quarter.** What changed in the client's business, in their words. | Client |
| 10 to 20 | **Outcomes, not activity.** Three business results our work contributed to, with numbers. | Account leader |
| 20 to 35 | **One idea they did not ask for.** A growth hypothesis from Tool 3, tested live. | Account leader + expert |
| 35 to 45 | **What is getting in the way.** Honest view of delivery, from both sides. | Delivery leads |
| 45 to 55 | **Next quarter.** Joint priorities, owners, dates. | Both |
| 55 to 60 | **The ask.** One specific thing we need from them. | Account leader |

SLA and service reports go in the pre-read, not the meeting.

## Stakeholder coverage check

| ROLE | NAME | OUR RELATIONSHIP OWNER | LAST REAL CONVERSATION |
|---|---|---|---|
| **Economic buyer (signs the budget)** | | | |
| **Business leader who owns the outcome** | | | |
| **IT / technical decision-maker** | | | |
| **Procurement** | | | |
| **Coach (wants us to win, tells us the truth)** | | | |
| **Sceptic (would rather we did not)** | | | |

**From the field:** if one person on your side owns every relationship on the client side, the account is one resignation away from going back to stage 1.

TOOL 7 · ACT AND MEASURE

# The 90-day sprint.

| WEEKS | GOAL | ACTIONS | OWNER | DATE |
|---|---|---|---|---|
| **1 to 2** | Know the numbers | Complete Tools 0, 1 and 2. Agree the stage honestly. | | |
| **3 to 6** | Form two hypotheses | Tool 3 for the two biggest white-space clusters. Test them internally. | | |
| **7 to 10** | Take one to the client | Use Tools 4 and 5. Agree a small next step. | | |
| **11 to 13** | Lead the review | Run the Tool 6 agenda. Ask for one thing. | | |

## The scorecard: run it now, and again on day 90

| STATEMENT | TODAY 0 / 1 / 2 | DAY 90 0 / 1 / 2 |
|---|---|---|
| We can state the account's revenue, margin and share of wallet without looking them up. | | |
| At least a third of our current pipeline was originated by us. | | |
| We have a written growth hypothesis for every white-space cluster. | | |
| We have relationships with at least four of the six roles in Tool 6. | | |
| In the last quarter, we brought the client an idea they had not asked for. | | |
| We have respectfully challenged a client assumption in the last six months. | | |
| Our last review spent more time on their business than on our service. | | |
| We have asked our own leadership to invest in this account. | | |

**0 to 6:** custodian. Start with Tools 1 and 2. **7 to 11:** on the way. Focus on Tools 3 and 5. **12 to 16:** you are leading the account. Use Tool 6 to make it joint.

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# Found the opportunity? Let's win it.

Originating growth is half the job. The other half is shaping it into a bid that wins and a deal that can be delivered. Dealcraft Advisory provides senior bid direction and independent reviews for SAP and enterprise software pursuits, drawing on 30+ years of deal-making across Europe, the Middle East, Africa and Latin America.

The research behind these tools, from Harvard, Stanford, Yale, Gartner and McKinsey, is in the article that accompanies this toolkit at dealcraftadvisory.ie/insights.

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