

Key Account Manager

Manage offerings for your top customers the smart way

Your key accounts expect to get personal consulting from their specialist at your company on a regular basis, content offerings that are tailored to their special interests and needs, and special deals and discounts, as they are 'special customers'.

To cater for this type of business (with a focus on managing subscriptions), here is your app covering the complete workflow of managing key accounts, from planning and designing offerings, creating, modifying, and finalizing contracts to handing agreements over to Customer Services.

Preparations at the Sales Department

As part of the planning process, the Key Account Manager app provides support for checking the order situation, determining upselling potentials, and designing specific packages/offerings.

Managing offers

When speaking to your key account on the phone or at a meeting, you can present one or several offerings (the app also supports getting the internal approval prior to making those). These offers can be created in written form based on templates and emailed after the call/meeting. All related emails and documents are stored, and reminders can be set up for follow-up actions at a later point in time.

Creating contracts

If your key account has accepted an offer, a contract can be created and emailed, and your Customer Services department will be notified for getting the signatures.

Final processes

At Customer Services, all data and information of the contract is checked, and the agreement is finalized. In case of subscription products, test or paid subscriptions are started. Invoices related to the new contract are created and sent out.

Renewals / closing the process

If a standing order has been agreed and the contract is renewed automatically, the system will update the contract with the renewed duration. If a contract is limited in terms of duration and will soon end, the process of making an offer can be restarted with data from the old package/offering.

The subscription/contract cycle is closed once the validity of the contract has ended and no renewal could be agreed on.

KEY FEATURES AND BENEFITS

- A STREAM app that covers the complete workflow of managing key accounts
- Preparations: check the order situation; determine upselling potentials; design specific packages/offerings
- Managing offers: present offerings on the phone and by email (based on templates); reminders for follow-up actions
- Create and email contracts
- Check details and finalize contract; send out invoices
- Standing orders; renewals; new offers based on old ones
- STREAM user interface: software that guides through processes in an intuitive way



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