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COURSE BROCHURE

Key Account Portfolio Selection and Joint Business Planning Training Course

21 – 25 November 2027
Online

Key Account Portfolio Selection and Joint Business Planning Training Course

Ref: 2817_108044 **Date:** 21 – 25 November 2027 **Location:** Online **Fees:** 1900 GBP

Key Account Portfolio Selection and Joint Business Planning is a 1-week training course for key account managers and sales leaders who must decide which customers earn deeper investment, and it ends with a signed-off joint business plan for one priority account. Larger buying groups and sharper procurement scrutiny make even effort across customers wasteful. Jupiter Prime Training runs this course on key account portfolio selection and joint business planning.

Why Key Account Portfolio Selection and Joint Business Planning Matters Now

Three forces shape this subject today. Customers consolidate suppliers and expect partners to co-invest. Finance teams now ask sales leaders to justify cost-to-serve for every large customer. A seller who picks accounts by revenue alone ends up over-serving low-margin buyers and under-serving those with real growth headroom. The course rests on account attractiveness scoring, customer lifetime value, the strategy map and the Balanced Scorecard BSC for linking account goals to measures.

Who Gains Most from Key Account Portfolio Selection and Joint Business Planning

- Owners of a book of major customers who must justify where account resources go
- Leaders of sales teams who set coverage models and tier criteria
- Commercial planners who build revenue forecasts by customer and segment
- Customer success heads responsible for renewal and expansion targets
- Bid and pricing specialists who shape offers for strategic buyers

A regional sales leadership group gains most when several members attend together and agree one tiering rule for the whole territory.

Key Account Portfolio Selection and Joint Business Planning Capabilities

Participants sort a customer base by attractiveness and fit, then turn the top tier into plans the customer co-owns.

- Score customers on attractiveness and supplier position — the tiering decision for next year
- Calculate cost-to-serve and account margin — finance partners reviewing coverage
- Map buying centres and influence lines — the account team assigning contact owners
- Design value propositions tied to customer goals — the customer sponsor approving joint initiatives
- Build a joint business plan with shared measures — quarterly reviews with the customer
- Communicate portfolio choices and trade-offs — sales directors reallocating effort

Key Account Portfolio Selection and Joint Business Planning Terms

- Account attractiveness — a weighted score of a customer's size, growth, margin potential and strategic fit for the supplier.
- Supplier position — how strongly the customer already rates and buys from the supplier compared with rivals.
- Cost-to-serve — the full cost of selling to, delivering for and supporting one customer over a period.
- Buying centre — the group of people across functions who influence, approve or block a purchase.
- Joint business plan — a plan written with the customer that sets shared goals, initiatives, owners and measures.
- Share of wallet — the portion of a customer's spend in a category that goes to one supplier.

Key Account Portfolio Selection and Joint Business Planning Day by Day

Day 1: The Customer Portfolio in Context

- Revenue Concentration Analysis — Exposure To A Few Large Buyers
- Supplier Consolidation Trends — Which Customers Are Shrinking Vendor Lists
- Customer Lifetime Value — Long-Term Worth Versus Current Order Size
- Share Of Wallet Estimation — Headroom Inside Existing Customers
- Coverage Model Review — Matching Seller Time To Customer Potential

Day 2: Selecting and Tiering Strategic Accounts

- Attractiveness Scoring Grid — Weighting Size, Growth, Margin And Fit
- Supplier Position Assessment — Where The Customer Rates Rivals Higher
- Portfolio Matrix Plotting — Invest, Maintain, Develop Or Harvest Choices
- Cost-To-Serve Calculation — True Margin By Customer After Support
- Tier Criteria Charter — Rules For Moving Accounts Between Tiers

Day 3: Understanding the Customer from Inside

- Buying Centre Mapping — Who Influences, Approves Or Blocks
- Relationship Strength Heatmap — Gaps In Executive And Operational Contact
- Customer Strategy Review — Linking Their Goals To Supplier Offers
- Pain And Gain Interviews — Evidence For Value Propositions
- Competitor Footprint Mapping — Rival Presence Across Customer Sites

Day 4: Building Value and Shared Measures

- Value Proposition Canvas — Offers Tied To Measurable Customer Outcomes
- Strategy Map For An Account — Linking Joint Goals To Initiatives
- Balanced Scorecard Measures — Shared Indicators Both Parties Track
- Initiative Business Case — Investment Request For Supplier Leadership
- Risk And Dependency Register — Threats To Account Growth Targets

Day 5: Practising the Joint Business Plan

- Tiering Rerun On A Live Portfolio — Applying Day Two Grids
- Stakeholder Contact Plan — Applying The Buying Centre Map
- Joint Goal Setting Role Play — Agreeing Measures With A Customer Sponsor
- Quarterly Business Review Agenda — Cadence For Plan Follow-Up
- Joint Business Plan Sign-Off — Completing The Plan For One Account

Applying Key Account Portfolio Selection and Joint Business Planning After the Course

- Rerun the attractiveness scoring grid on the full customer list and present revised tiers.
- Hold a joint planning session with one top-tier customer to agree shared measures and owners.

Key Account Portfolio Selection and Joint Business Planning Questions FAQ

What is key account portfolio selection and joint business planning, and why does it matter now?

It means choosing which customers deserve deeper investment, then writing growth plans with them. It matters now because buyers are cutting supplier numbers, and sellers who spread effort evenly lose both margin and the accounts that could grow most.

Which roles gain most from key account portfolio selection and joint business planning?

Key account managers, sales leaders and commercial planners gain most. You benefit if you own large customers, set coverage rules or forecast revenue by account in sectors such as manufacturing or healthcare supply.

How does key account portfolio selection and joint business planning differ from a client retention course?

It starts earlier, with deciding which accounts to invest in, rather than with keeping every client. It weighs margin, potential and cost-to-serve before planning with selected customers.

What do you bring back from key account portfolio selection and joint business planning?

You bring back a tiered view of your customer base and a draft joint business plan for one priority account. Both are ready to present to your sales director.

Key Account Portfolio Selection and Joint Business Planning: The Way Forward

The joint business plan built during the course first informs whether the chosen account receives extra seller time and investment next quarter. Account managers use it with the customer sponsor; sales directors use it to rebalance coverage. After its first quarterly review, revisit the tier criteria, since one live account often reshapes portfolio weighting.