JUPITER PRIME

Consulting • Training • Advisory

جوبيتر برايم للاستشارات والتدريب

COURSE BROCHURE

Advanced Client Retention and Account Growth Strategies Course

25 January – 5 February 2027
Rome

Advanced Client Retention and Account Growth Strategies Course

Ref: 181_5327 **Date:** 25 January – 5 February 2027 **Location:** Rome **Fees:** 11100 GBP

Client Retention and Account Growth Strategies is a 2-week training course for key account managers, client relationship directors and business development leads, who leave with a Strategic Account Growth Plan for one priority client. Winning a new client often costs far more than keeping and expanding an existing one, and buying committees now judge suppliers on measurable outcomes. Jupiter Prime Training delivers Client Retention and Account Growth Strategies for these account leaders.

Why Client Retention and Account Growth Strategies Matter Now

Three forces reshape account work today: procurement teams that re-tender contracts more often, buying committees with more members and longer decision chains, and usage data that reveals early churn signals to suppliers willing to read it. A supplier that manages its portfolio well defends renewals, widens share of wallet and earns referrals; one that treats every client alike discovers churn only when the termination notice arrives. The course rests on customer lifetime value CLV modelling, key account management KAM practice and the Net Promoter Score NPS as a relationship signal.

Who Gains Most from Client Retention and Account Growth Strategies

- Account owners responsible for renewals, contract extensions and revenue from named clients
- Relationship directors who hold executive sponsorship at strategic clients
- Business development leads who turn existing accounts into cross-sell and upsell pipelines
- Client success leads who monitor usage, adoption and health scores after the sale
- Commercial managers who segment portfolios and allocate account coverage

Commercial functions that send an account owner and a client success lead together gain most, because renewal risk and expansion opportunity are then judged from one shared view of each client.

Client Retention and Account Growth Strategies Capabilities

Participants practise reading a client portfolio as a set of retention risks and growth options, then acting on each account with the right depth of coverage.

- Assess each client with a health score that blends usage, sentiment and commercial signals — renewal forecasts
- Calculate customer lifetime value and share of wallet for priority accounts — portfolio investment choices
- Design a retention playbook triggered by specific churn signals — client success leads
- Build an executive relationship map covering sponsors, influencers and blockers — account directors
- Apply whitespace analysis to plan cross-sell and upsell offers — business development leads
- Communicate value delivered through structured business reviews — client executives

Key Client Retention and Account Growth Strategies Terms

- Customer lifetime value CLV — the projected net revenue a client relationship generates across its expected duration.
- Share of wallet — the portion of a client's total spend in a category that goes to one supplier.
- Client health score — a composite indicator combining usage, satisfaction and commercial signals to flag renewal risk early.
- Churn signal — an observable change in client behaviour, such as falling usage or sponsor departure, that precedes loss.
- Whitespace analysis — a grid of products against client business units that reveals unsold opportunities.
- Quarterly business review QBR — a structured meeting where supplier and client assess value delivered and agree next priorities.

Client Retention and Account Growth Strategies Day by Day

Day 1: The Economics of Keeping Clients

- Customer Lifetime Value Modelling — Setting Spend Limits for Each Relationship
- Retention Versus Acquisition Economics — Rebalancing Commercial Effort
- Procurement Re-Tender Trends — Anticipating When Contracts Reopen
- Buying Committee Evolution — Why Single Contacts No Longer Protect Accounts
- Portfolio Revenue Concentration — Exposure to a Few Large Clients

Day 2: Segmenting the Client Portfolio

- Account Tiering Matrix — Matching Coverage Depth to Client Potential
- Attractiveness Versus Position Grid — Choosing Invest, Maintain or Harvest
- Needs-Based Client Segmentation — Grouping Accounts by Buying Motive
- Cost-to-Serve Analysis — Finding Clients That Erode Margin
- Coverage Model Design — Assigning Owners, Pods and Success Roles

Day 3: Reading Client Health

- Client Health Score Design — Weighting Usage, Sentiment and Commercial Signals
- Churn Signal Catalogue — Early Warnings Before Termination Notices
- Relationship NPS Surveys — Measuring Sponsor and User Loyalty Separately
- Usage and Adoption Dashboards — Spotting Shelfware and Declining Activity
- Renewal Risk Register — Ranking Accounts by Exposure and Timing

Day 4: Executive Relationship Mapping

- Decision-Making Unit Mapping — Sponsors, Influencers, Users and Blockers
- Relationship Strength Scoring — Depth and Breadth of Contacts per Account
- Multi-Threading Strategy — Reducing Dependence on One Champion
- Executive Sponsor Pairing Scheme — Pairing Leaders Across Both Organisations
- Sponsor Departure Contingency — Protecting Accounts When Champions Leave

Day 5: Building the Strategic Account Plan

- Client Business Analysis — Linking Their Goals to Supplier Offers
- Account SWOT and Competitor Position — Where Rivals Threaten Renewal
- Mutual Success Plan — Shared Objectives Signed by Both Parties
- Account Plan Templates — Objectives, Actions, Owners and Milestones
- Account Plan Governance Rhythm — Monthly Checks and Annual Resets

Day 6: Retention Playbooks

- Onboarding Success Milestones — Securing Early Value in the First Months
- Churn Signal Response Plays — Matching Interventions to Warning Types
- Save Desk and Win-Back Offers — When Concessions Make Commercial Sense
- Renewal Readiness Checklist — Preparing Evidence Before Negotiation Opens
- Loss Analysis Interviews — Learning Why Clients Actually Left

Day 7: Growing Share of Wallet

- Whitespace Analysis Grid — Products Against Client Business Units
- Cross-Sell Propensity Signals — Which Clients Are Ready for More
- Upsell Packaging and Tiering — Moving Clients to Higher Service Levels
- Expansion Business Case — Quantifying Return for the Client's Buyers
- Land and Expand Sequencing — Order of Offers Across Divisions

Day 8: Proving Value to Clients

- Value Realisation Metrics — Outcomes the Client Agreed to Measure
- Quarterly Business Review Design — Agenda, Evidence and Decisions Sought
- Value Stories and Case Evidence — Turning Results Into Sponsor Language
- Pricing Pressure Responses — Defending Value Before Discount Requests
- Contract Renewal Negotiation — Trading Term, Scope and Price Together

Day 9: Aligning the Organisation Behind Key Clients

- Account Team Charter — Roles of Sales, Service, Delivery and Finance
- Escalation Routes for Strategic Clients — Fast Decisions on Client Issues
- Client Feedback to Product Loop — Turning Requests Into Roadmap Input
- Account Management Incentives — Rewarding Retention and Expansion Balance
- Portfolio Reporting to Leadership — Renewal Forecast and Growth Pipeline

Day 10: Practising the Strategic Account Growth Plan

- Health Score Calibration — Applying Day 3 Signals to a Live Client
- Relationship Map Gap Closure — Building on Day 4 Sponsor Mapping
- Whitespace Opportunity Ranking — Using Day 7 Grids to Pick Offers
- QBR Rehearsal With Peer Challenge — Testing Day 8 Value Evidence
- Strategic Account Growth Plan — Retention Moves, Growth Offers and Owners

Applying Client Retention and Account Growth Strategies After the Course

- Score every top-tier account with the client health model, list the three weakest and launch the matching churn signal response play for each.
- Run a whitespace analysis on one priority client and present two cross-sell options with an expansion business case at the next business review.

Client Retention and Account Growth Strategies Questions FAQ

What are client retention and account growth strategies, and why do they matter now?

They are the methods suppliers use to keep valuable clients and widen what each one buys. They matter now because procurement re-tenders more often, buying committees are larger and early churn signals can be read before a contract is lost.

Which roles gain most from client retention and account growth strategies training?

Key account managers, relationship directors and business development leads gain most. Client success leads and commercial managers also benefit, since they monitor client health, segment portfolios and decide where account coverage and executive sponsorship are invested.

How do client retention and account growth strategies differ from a general sales skills course?

The focus is on existing clients rather than new prospects. A sales skills course trains prospecting and closing; here you work on portfolio segmentation, health scoring, relationship mapping, retention plays and expansion within accounts already won.

What do you bring back from client retention and account growth strategies training?

You bring back a growth plan for one priority client. It holds a calibrated health score, a relationship map with sponsor gaps closed, ranked whitespace offers and a business review approach, each with named owners.

Client Retention and Account Growth Strategies: The Way Forward

The Strategic Account Growth Plan first informs which retention moves to make before the next renewal window and which expansion offer to lead with. Account owners, relationship directors and client success leads use it to align their teams. After its first use, revisit the health score weightings, since real renewal outcomes show which churn signals deserve more attention.