



**Accelerate Growth.  
Transform Relationships.**

+1 303 495 6201  
[info@kapta.com](mailto:info@kapta.com)



## Become the partner your clients need.

The business world is changing. Customers have more power than ever, and the standard of excellence required to support their success is only rising. As the competitive landscape grows, it's crucial to have an early warning system if your clients are at-risk so you can act fast.

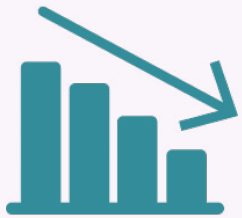
By focusing on Key Account Management and implementing targeted tools, customer success becomes the backbone of a business by generating revenue and increasing retention.

Kapta helps Account Managers thrive through expert advising, tried-and-true methods, and modern technology. Transform client relationships by bringing visibility, accountability, and strategy to your organization.



# Key Account Management is more important than ever.

Build trustworthy, mutually beneficial relationships with key accounts to ensure retention and drive growth. Be indispensable to your customers and build a life-long relationship.



## Reduce the Risk of Client Churn

Gain an intimate understanding of your customer's biggest challenges and goals to create long-term growth plans.



## Increase Engagement

Communicate openly and engage often with key accounts to build trust, identify upsells, and improve renewal rates.



## Adopt Best Practices & Streamline Processes

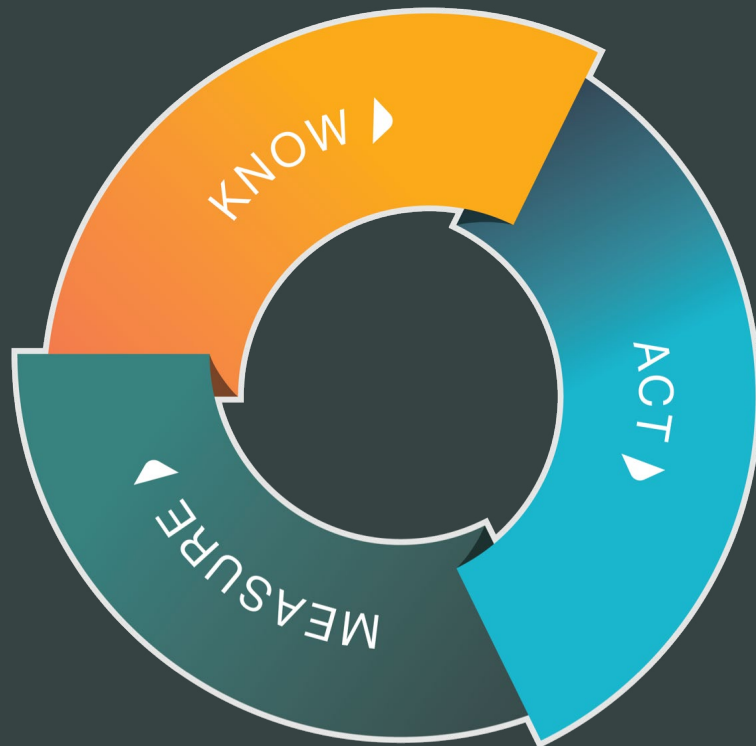
Approach key accounts with strategic plans and work more efficiently with automated technologies that improve visibility into your most valuable clients.



## Drive Growth

Identify existing organic growth opportunities among key accounts by prioritizing their revenue.

# Kapta KAM Process™



## Know, Act, Measure

Any account plan should be based on a repeatable process that will shape your strategic account management throughout the year.

**Know** basic information, strategy, relationships, and more. Within your KAM activities, focus on information gathering and validating objectives.

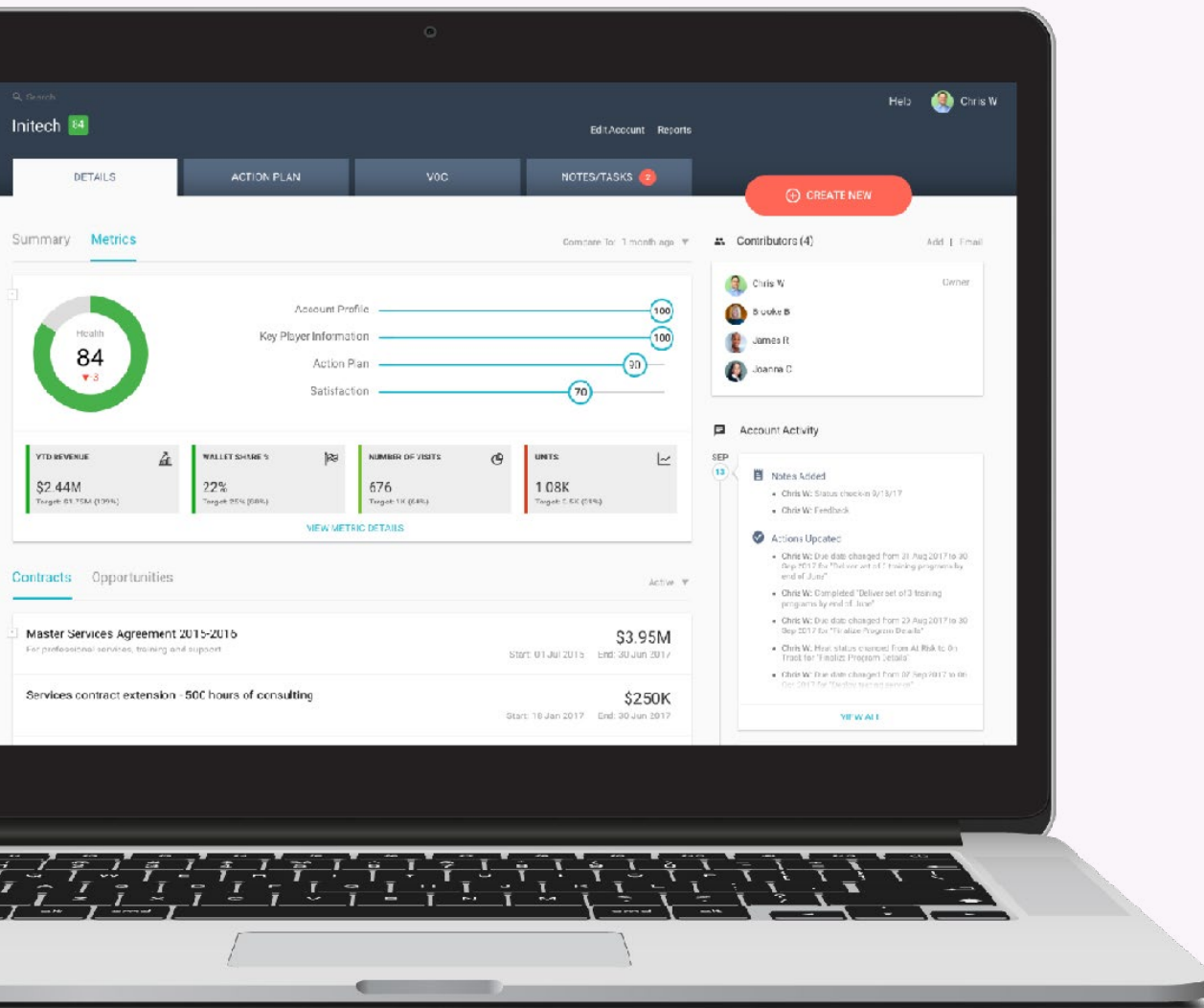
**Act** to ensure your team and the client succeed. Link activities to customers' needs and to activities that increase their likelihood of success and reduce the risk of churn. These should align with conversations that emerge during account reviews.

**Measure** success and validate your progress with the customer and internal stakeholders.

KAM is only effective if the entire organization is aligned on objectives and committed to working diligently to support priority customers.

# Key Account Management Platform

Become an integral part of your client's success by understanding their needs and acting as a strategic partner to grow their business. With Kapta, you can easily manage all assets of Key Account Management in one system ensuring alignment and enabling visibility.



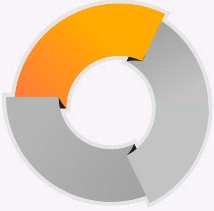
“Kapta helps us accelerate into market. One of our biggest challenges has been aggregating data that’s meaningful as we try to deliver more value.

We leverage Kapta to track metrics and automate the account planning process.”

**Danielle Matteson**  
VP of Strategic Accounts, AVI-SPL



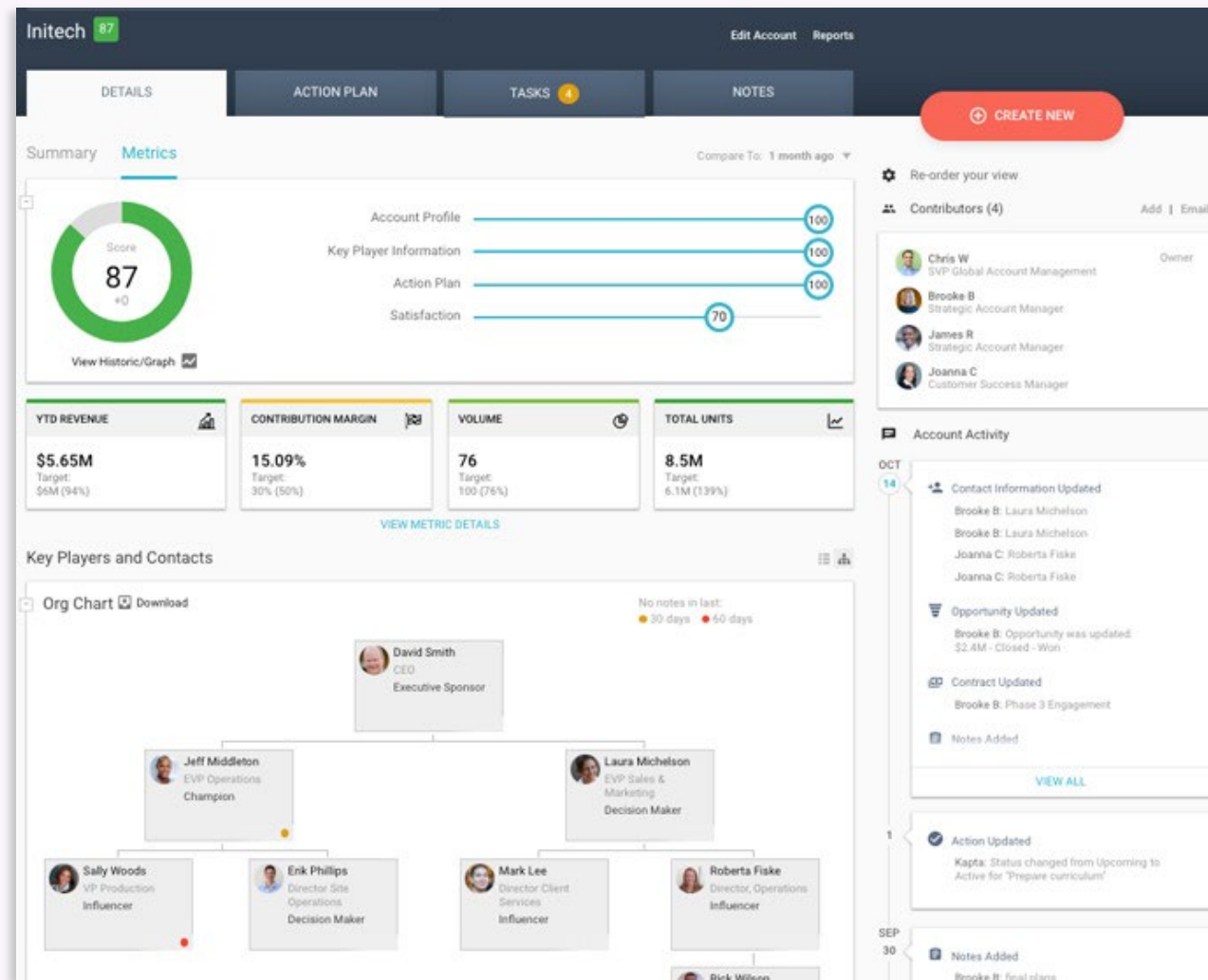
While KAM drives revenue, this team functions separately from your sales operation and deserves dedicated tools. [Learn why your CRM platform is not enough for key account management. >>>](#)

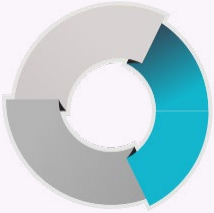


# Know Your Customer

Customizable tools help you capture current knowledge, fill in missing links, and see the big picture.

- + Gain a dynamic view of relationships to better understand your key decision-makers, champions, and influencers.
- + Receive notifications when relationships become stale or when it's time to renew the contract.
- + Perform agile SWOT analysis.
- + Manage Voice of the Customer feedback and take action.



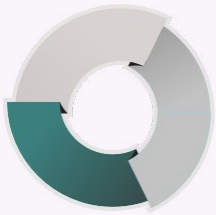


## Act with Purpose

Kapta makes it easy to plan, execute, collaborate, and stay on strategy—internally and with your customer.

- + Drive strategic initiatives with robust, custom Account Plans.
- + Collaborate with teams and easily assign tasks with timelines.
- + Drive consistency with playbook and plan templates.
- + Track various projects and objectives in a streamlined dashboard.

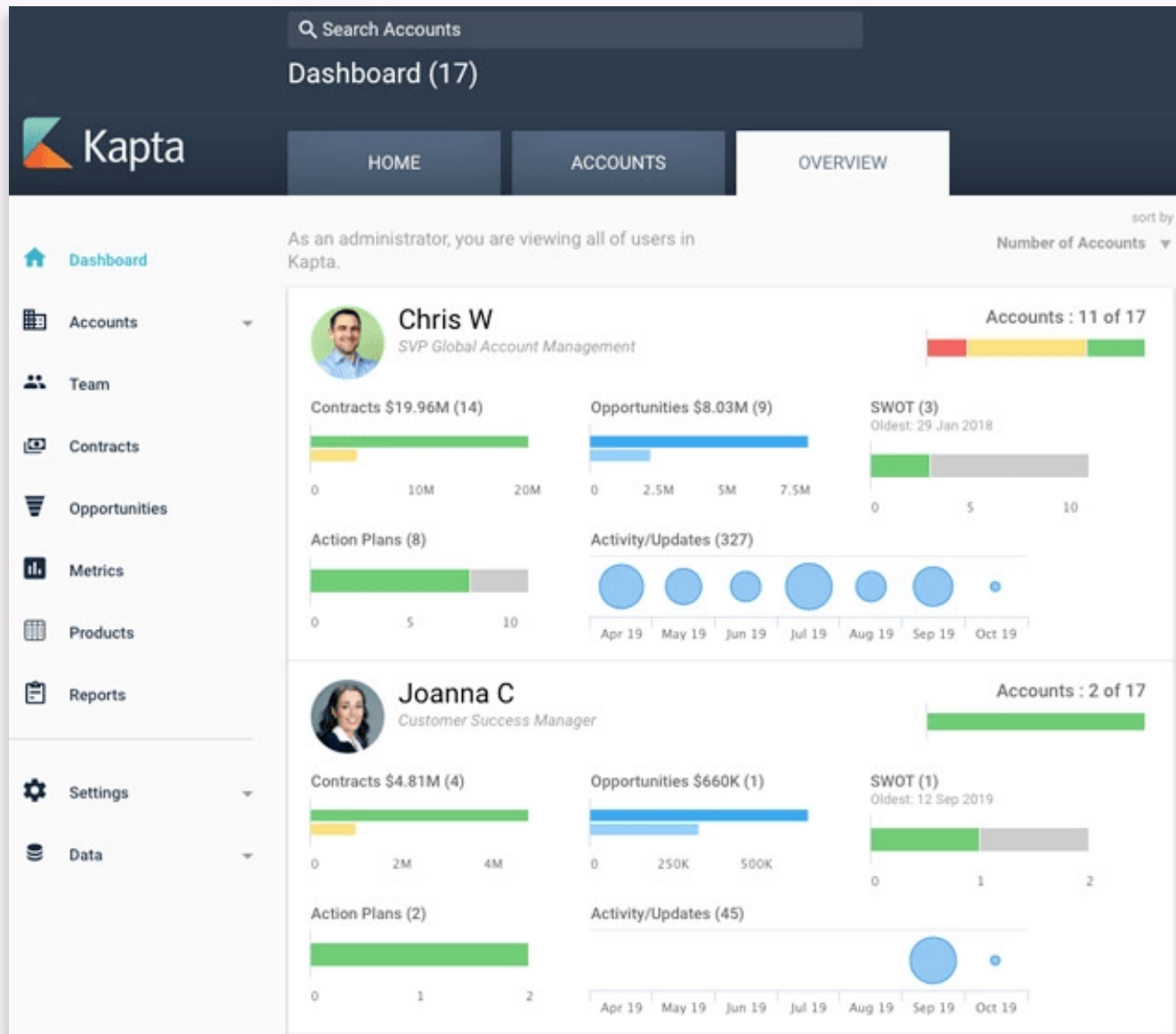
The screenshot displays the Kapta dashboard for the 'Initech' account. The interface includes a top navigation bar with a search bar, account name 'Initech' with a notification badge '87', and an 'Edit Account' link. Below this is a tabbed interface with 'DETAILS', 'ACTION PLAN', 'TASKS' (with a notification badge '4'), and 'NOTES'. The left sidebar contains a navigation menu with icons and labels for Dashboard, Accounts, Team, Contracts, Opportunities, Metrics, and Products. The 'Accounts' section is expanded, showing a list of accounts including Alphacomm, Giga Health, Harris Systems, Highlander, Initech (highlighted), Lifeline International, Nero Inc., Rochester Systems, and Tweedle. The main content area shows 'Customer Goals and Outcomes' in 'Hierarchy' view. It lists three goals: 'Accelerate Time to Market for new Product Launch' (2 Objectives, 69%), 'Reduce Error Rate by 5%' (1 Objectives, 65%), and 'Execute 2020 Promotional Strategies' (1 Objectives, 93%). Below this is a section for 'Our Goals for this Account' with two goals: 'Grow Revenue by \$2.7M by end of year' (2 Objectives, 75%) and 'Relationship Goals' (1 Objectives, 100%). Each goal section includes '+ ADD GOAL' and '+ LAUNCH TEMPLATE' buttons. The top right of the main content area shows a 'historical view' calendar icon and the date '14 Oct 2019'.



## Measure What Matters

Use strategic metrics and reporting to show your customers—and your C-suite—the results of your work.

- + Quickly access the health score of your key accounts.
- + Create customized KPI dashboards to ensure internal team alignment.
- + Report on client satisfaction (NPS).
- + Discover KAM performance insights and easily share these reports with key stakeholders.





## Gain Expert Coaching

Effective Key Account Management can significantly impact the success of your client's business and your own organization. Without the right tools and coaching, it can be difficult to establish strategic processes that ensure maximum achievement.

Our KAM consultants work with you to:

- + Ensure strategic alignment
- + Identify opportunities for efficiency and account growth
- + Increase user adoption

**Ready to learn what Kapta can do for you?**

**CONTACT US**



+1 303 495 6201  
[info@kapta.com](mailto:info@kapta.com)