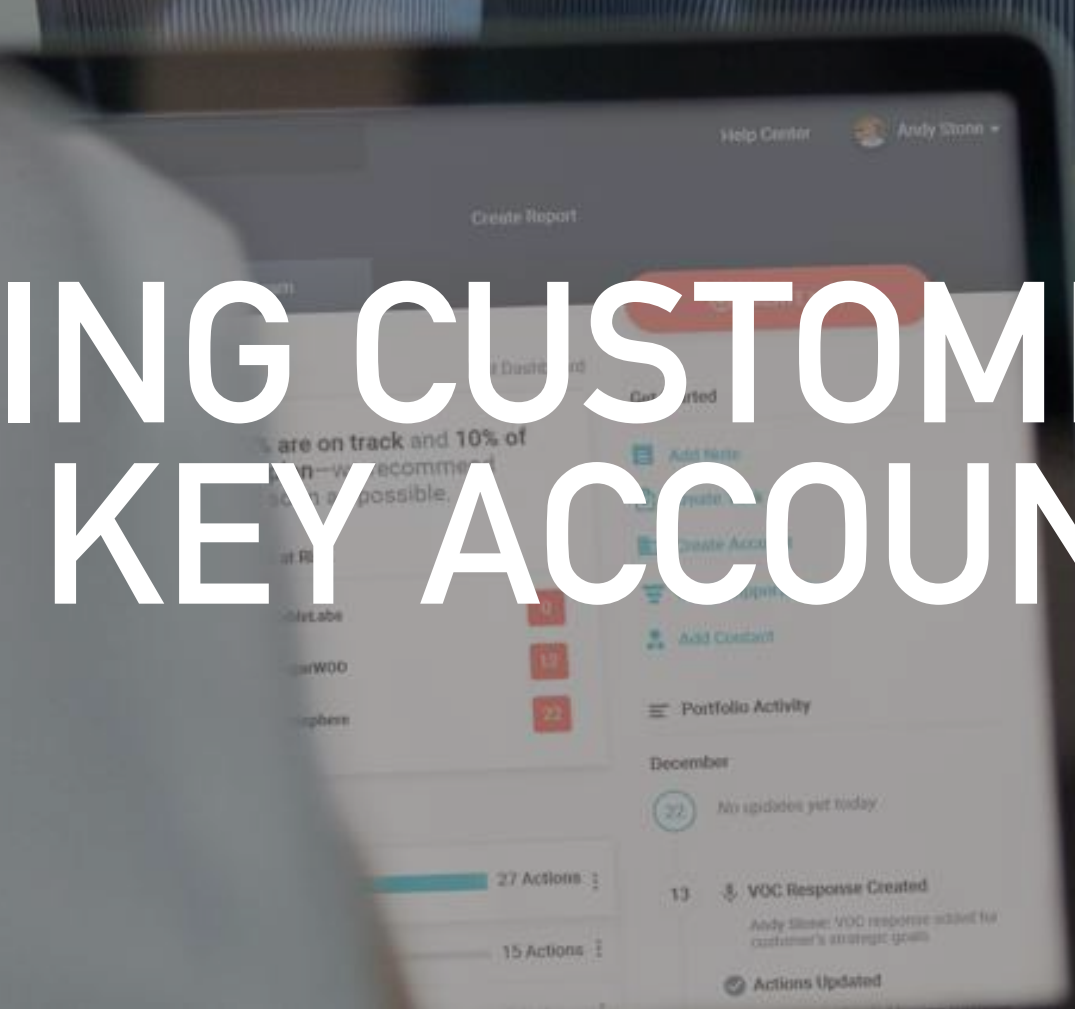




# KAM TO-GO

A CHECKLIST FOR BUILDING CUSTOMER  
ENGAGEMENT THROUGH KEY ACCOUNT  
MANAGEMENT





## YOUR ROADMAP FOR CUSTOMER ENGAGEMENT

Our KAM Process is a proven methodology for transforming customer engagement through Key Account Management:

- ▶ Know more, so you can plan better
- ▶ Act strategically to drive meaningful change
- ▶ Measure results across multiple endpoints



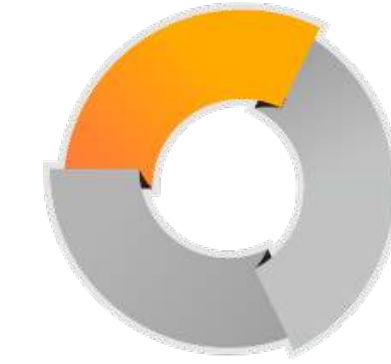
# WHY KAM TO-GO?

For companies that are new to Key Account Management, this checklist can help you implement Our KAM Process. Use this approach to put customers first, build engagement, and support strong relationships and internal processes as you grow.

This checklist uses the same methodology we use in our Action Planning, working sequentially and strategically from goals to objectives to actions to tasks in order to create discrete, manageable to-do lists for your team that ultimately help your customers succeed.

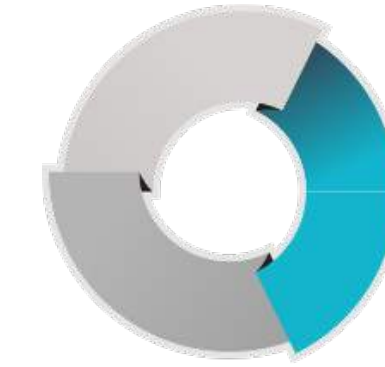
Head over to [kapta.com](https://kapta.com) to learn more, or schedule a Kapta demo to see how our tech platform supports this process.

# KNOW



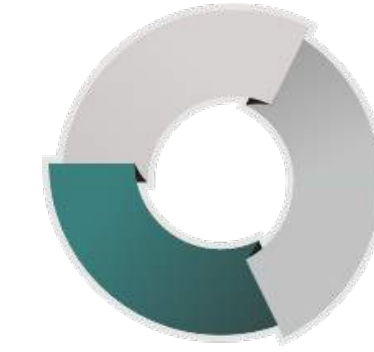
Goal	Objective	Action	Tasks
Strengthen the personal and organizational partnership	Understand the culture and reporting structure at your client's organization	Build an org chart for your customer's organization	Assign owner
			Gather team input
			Fill in gaps with client
Provide exceptional, proactive client service	Understand your client's goals and expectations	Conduct Voice of Customer (VOC) interviews with key customers	Develop questions
			Get answers (client face or phone time)
			Distribute to team
Help your client succeed in their specific market	Understand internal and external advantages and disadvantages	Conduct a SWOT workshop	Conduct research in advance
			Develop thought-starters for SWOT
			Conduct workshop and distribute results to your team

# ACT



Goal	Objective	Action	Tasks
Drive organic growth for your organization by putting clients first	Drive customer engagement to increase willingness and ability to renew contracts and/or increase SOW	Build an action plan designed to help your customer achieve their business goals	Identify big picture goals
			Break into smaller objectives
			Conduct tactical planning with client input
			Identify and assign tasks to team
Build engagement and client satisfaction	Conduct regular check-ins for client feedback and relationship management	Create client review template and fill in for each check-in	Gather action/results to date
			Identify next steps and goals
			Solicit client feedback
			Adjust approach as needed

# MEASURE



Goal	Objective	Action	Tasks
Drive organic growth by demonstrating value to clients	Demonstrate quantitative value to clients through ROI	Measure progress for individual actions or initiatives	Establish baseline data
			Identify relevant KPIs
			Track against KPIs periodically and at conclusion of project
			Visualize, report, and share results
Build a customer-first culture within your organization	Demonstrate internal ROI for C-suite and broader team	Measure organic growth as evidence of success with KAM as well as motivation for continued momentum	Track contract renewals and SOW increases
			Gather client endorsements
			Present to team to get buy-in and build excitement



## RINSE. REPEAT.

Engaged, satisfied customers are going to want to start the next project right away.

Ask yourself: What do we know now? How can we act even more effectively this time? How will we continue to measure success?



## THE TRANSFORMATION STARTS HERE.

Kapta can help you transform customer relationships, internal processes, and company culture.

Contact us to talk through any questions you have:  
[info@kapta.com](mailto:info@kapta.com)