

Customer Account Development Strategies

Keep that Customer - Grow that Account

OTS Management offers a two day seminar called Customer Account Development Strategies or "CADS".

The seminar is designed for sales people and account managers of your organisation to analyse their own sales behaviours and develop strategies to grow their customer accounts.

Are you in a business where people are responsible for maintaining relationships with account customers?

You may be a professional office, perhaps accountants or lawyers where each senior accountant or lawyer has to service their portfolio of clients but must also maintain close relationships with their clients and develop their account.

You may be in a manufacturing business or a distributorship where your sales people have to get to know their customers that they call on and not only keep those relationships safe and away from your competitors, but also find better sales penetration into those accounts.

As long as you have people responsible for keeping clients or customers happy and establishing, maintaining and expanding the account relationship, you need to give them a process of dealing with their customers, recognising opportunities, satisfying personal as well as organisational needs, and dealing with problem accounts.

This process, which we call CADS (Customer Account Development Strategies) turns you from being an outsider to them, to being a preferred supplier, to being a friend, and ultimately to become their business partner.

Who is it for?

The CADS two day seminar is designed for the sales forces and account managers of Small-Medium Enterprises (SME's) in any industry.

If your business has between 5 to 20 people who are responsible for maintaining client or customer relationships, satisfying their needs in products or services, and finding new entry points for other products or services, they need to attend this seminar.

The CADS seminar is particularly useful for:-

- Accounting and law firms where each professional has their own portfolio of clients and must not only service them but maintain and grow relationships;
- Businesses that have independent sales people who look after their own customer lists;
- Businesses who have had long term customers but are finding the competition starting to attack their customer base.

Clients have also found that after their team have attended a CADS seminar, because of the tools and worksheets taught at the seminar, it has emerged as their first step to establishing a formal Sales System in organising and orchestrating all their sales and account development efforts.



Become your customer's Business Partner



Methodology

There is an old Chinese proverb - "If a man is told how to plant rice, he takes notice; if a man sees a rice farmer at work, he understands; but if a man *works* in the paddy field, then he will truly learn how to be a rice farmer".

CADS is not a lecture - it is based on interactive exercises and role-plays.

In particular the CADS seminar takes you through the CADS process on a customer you want to grow a relationship with - you walk away with an immediate and real plan that you can implement the next day.

An account relationship is nothing but the way a customer sees you. How he sees you is created by the extent you satisfy needs.

If you are not satisfying any needs, you are an outsider.

If you satisfy his personal needs only he will see you as a friend.

On the other hand if you satisfy his corporate needs but not his personal needs, he sees you as his supplier.

The ideal account relationship is where he sees you as his business partner where you both invest in a long term and mutually beneficial relationship. To do this you need to be seen as satisfying both his personal and corporate needs.

CADS gives you the process to

build the ideal relationship through the steps of:-

- Understanding personal and corporate needs;
- Dealing with personal needs;
- Probing and developing corporate needs;
- Developing an individualised strategy based on common principals;
- What to do when things go wrong.



Teik Oh, Director of OTS Management

CADS was developed in the late 1980's by a team led by Teik Oh when he worked at Arthur Andersen's (an international financial services company) world headquarters college facility in Chicago.

CADS was designed for Arthur Andersen consultants to maintain and grow their client portfolios.

Since then, Teik has further developed it into a course that can be run for any type of business.

Teik is himself a Chartered Accountant and has had a successful career in international accounting firms as well as his own business and in each position he has successfully grown his own portfolio using the processes taught in this course.

About OTS Management

OTS Management is a quality and value driven boutique consulting and accounting company that provides organisational development services to commercial, growth-oriented Small and Medium Enterprises who require business services, advice and coaching.

We give our clients comfort in their decision-making by providing them with our experience and independent advice that saves them time and helps them grow. Unlike other accounting services companies, our clients have significant contact with our senior people.

We meet our own high expectations in order to exceed the expectations of clients.

Our services include:

- *Change Management consulting*
- *The Zest Factor - find the zest in your organisation*
- *Strategic & Business Planning*
- *SMART Marketing workshops*
- *Team Development workshops*
- *Performance Management Systems*
- *Zest Tests - Business Diagnostics on your organisation*