ACCOUNT REVIEW

Some questions to ask yourself before you coach

Do I have a clear picture of the health and potential of each key account?

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Have I reviewed past interactions and performance metrics for this account?

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What are the biggest risks and opportunities in this account right now?

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How well does the team understand the client’s business priorities and challenges?

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Are we proactively addressing competitive threats in this account?

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Do we have a structured plan to grow and deepen relationships within the account?

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Are there cross-selling or upselling opportunities we have not yet explored?

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How well does our current value proposition align with the client’s evolving needs?

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Have I identified key stakeholders we are not yet engaging with?

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How confident am I in the team's ability to navigate complex decision-making structures in this account?

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Are there internal roadblocks within our company preventing us from maximizing this account?

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How effectively are we using data and insights to guide our account strategy?

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What key actions should my team prioritize to strengthen our position in this account?

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Coaching Questions to ask your team

What have we not tried yet that could add more value?

What are some of the key trends we are seeing in these industries?

What are some of the pains we can solve but are not yet solving?

Where are we in danger of letting the competition in the back door?

What is the competition doing to generate new business?

Where can you build deeper/better relationships with this client?

Which departments/divisions can you expand your network in?

What is your plan to get introductions to the Head of X?

How would you rank your accounts in terms of priority?

How realistic is your plan considering recent performance?

What is going on with this client in other areas of the business?

Which conversations are really going to make a difference?

What is the minimum level of prospecting activity to win this account?