

AVIONTÉ
CONNECT

Best Practices for Client Retention and Expansion

TO SAFEGUARD AND GROW YOUR BUSINESS LEVERAGING AI

Presenters



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The Agenda

1

The Simple Truths

2

Understanding Client Risk

3

Building Successful Account Management Plans

4

Leveraging AI for Proficiency

5

Q&A



The Simple Truths



Simplicity is the
ultimate sophistication.

-Leonardo DaVinci



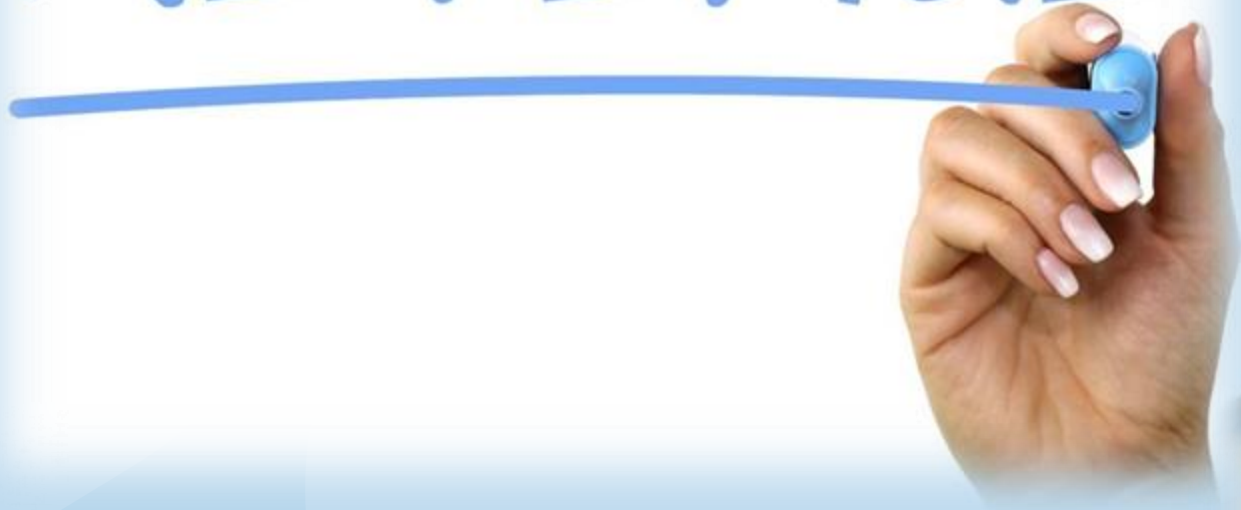
The Simple Truths



What Business Are You In?



REVENUE



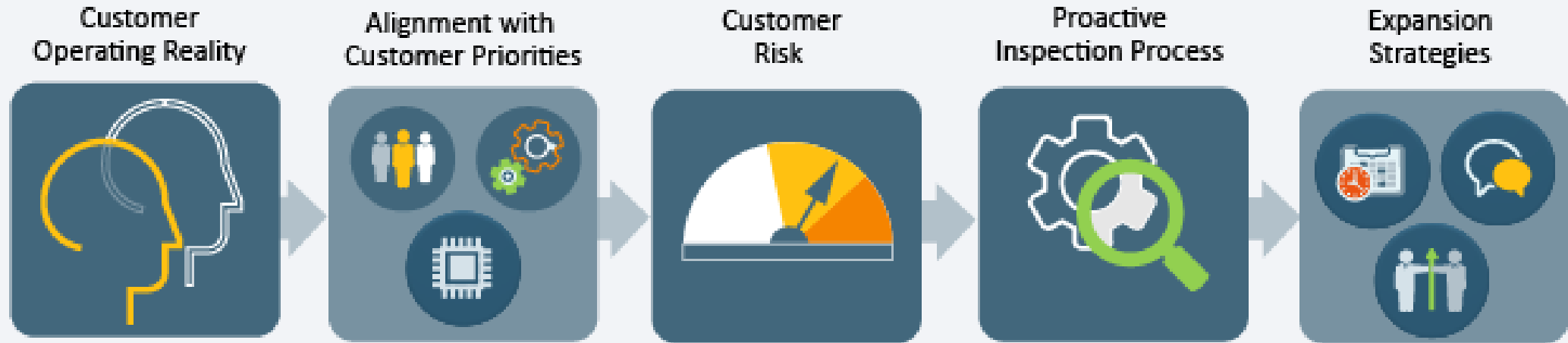
“Not finance. Not strategy. Not technology. It is teamwork that remains the ultimate competitive advantage, both because it is so powerful and so rare.”

Patrick Lencioni, Author





Account Management Approach



Understanding Client Risk



Why is Client Risk So Important?

Client retention is a direct correlation to your company's ability to deliver on what you promised during the sales process...

...AND your ability to adapt to the *changing needs* of your client over time, *personnel change, changing priorities and advancing technology*



Are Your Clients/Revenue at Risk?

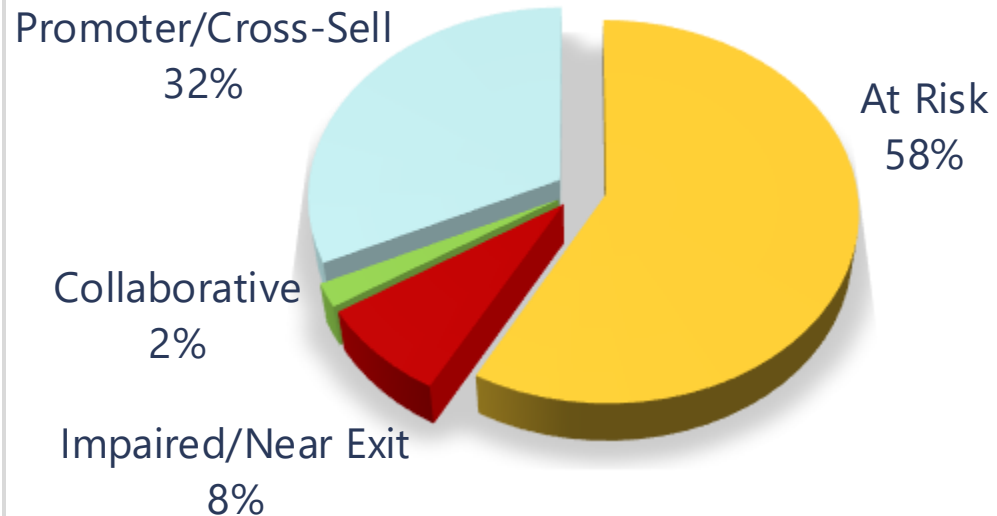


According to your field team, everything is going just fine...

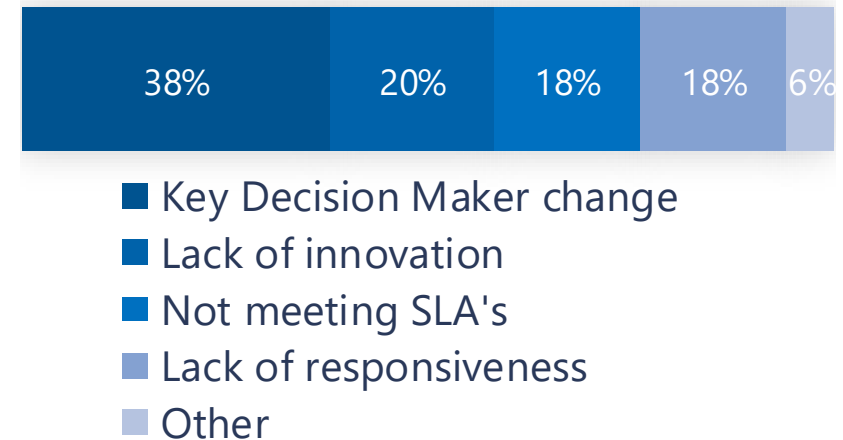


Client Risk Assessment

Risk Across Client Base



Top Reasons for Client Risk



The Whirlwind

Tactical, reactive environment

Makes it difficult to achieve breakthrough performance



100+ emails, conference calls and meetings

Blocks strategic execution

Urgent (day job) v. Important (goals)



ACTIONABLE STEPS



**If we solve our
customers' problems...
we'll solve our own.®**



Retention and Growth - Selling to Customers

New Customer

5-20%
Probability

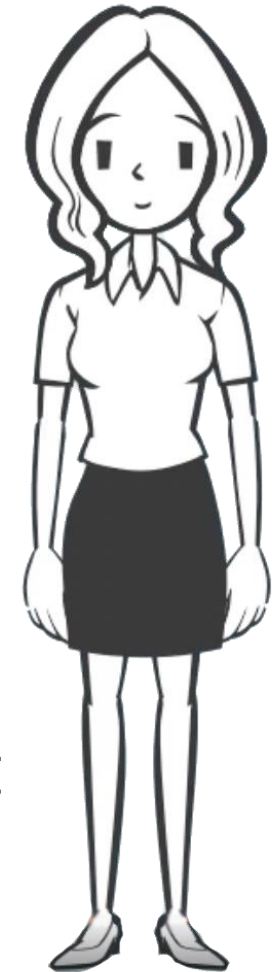
6-7x Harder to
sell to a new customer



Current Customer

60-70%
Probability

Customer loyalty must
be earned every day



Cross-Selling Creates:

Emotional

Entanglement

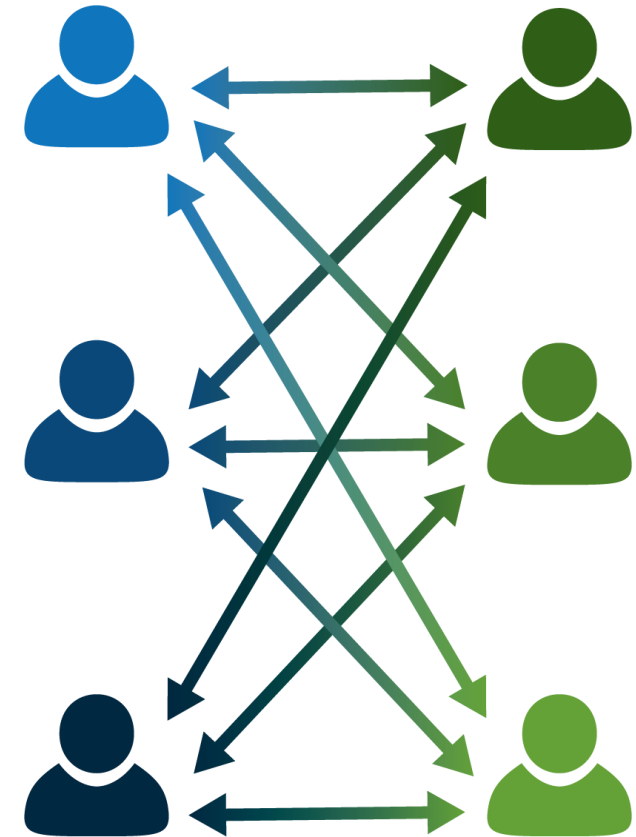
Economic

Entanglement



Web of Influence and Relationship Mapping

- Minimum 3 departmental relationships at 3 different levels minimum
 - Across C-level, Operations , Procurement
 - Reduces client risk
 - Cross-selling
- Referrals
- Clients want LESS suppliers, not more
- Creates partnerships and innovation
- Far more accurate operating reality



QBR: Your Most Important Meeting



Leveraging AI



What is ChatGPT?

- An AI-powered large language model (LLM) developed by OpenAI
- GPT: Generative Pre-trained Transformer
- RLHF: Reinforcement Learning with Human Feedback



Technology for Transactions

People for Relationships



Where Can Generative AI improve productivity?



- 15 Sales & Account Management Use Cases
- 12 Recruiting Use Cases
- 13 Marketing Use Cases
- 12 Leadership Use Cases

Staffing Industry Persona Guide





Key Account Management Coach Butler Street

By Karla Dougherty 

This GPT is an expert in Key Account Best Practices with all Butler Street Insights

Help me create a
Quaterly Business
Review Action plan

Provide me with
Strategies to
diminish Risk...

Help me with
a Relationship
assessment

Help me create a
Relationship Map

Key Points

1. Be a Problem Solver
2. Build Relationships at Multiple Levels
3. Conduct QBRs
 - ✓ Show Value, uncover new needs and opportunities
4. Leverage AI to Save You Time
 - ✓ Technology for Transactions,
People for Relationships



Q & A



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