Category

Consulting

Consulting Client Account Planning Playbook

Planning the account's future deliberately, not just reacting to the next RFP or renewal

- Practitioner
- Intermediate
- Template Included

- Mithun A. Sridharan

- 09 July 2021
- 4 minute(s)

Overview

A framework for proactive consulting client account planning — mapping the account's full potential, the relationship's current state, and a deliberate multi-year plan — rather than managing the relationship reactively from one engagement or renewal decision to the next.

How is this different from the Trusted Advisor Account Growth &

Client Retention Playbook? That playbook covers the relationship-building behaviors and mindset for growing an account organically. This one is the more structured planning discipline — a documented account plan with specific goals, whitespace mapping, and a multi-year view — that account teams use as an ongoing planning tool.

Is formal account planning worth the effort for every client

relationship? Generally reserved for the firm's most strategically important accounts, where the effort of building and maintaining a formal plan is clearly justified by the account's actual or potential scale.

{ "@context": "https://schema.org", "@type": "FAQPage", "mainEntity": [{ "@type": "Question", "name": "How is this different from the Trusted Advisor Account Growth &", "acceptedAnswer": { "@type": "Answer", "text": "Client Retention Playbook?\nThat playbook covers the relationship-building behaviors and mindset\nfor growing an account organically. This one is the more structured\nplanning discipline — a documented account plan with specific goals,\nwhitespace mapping, and a multi-year view — that account teams use as\nan ongoing planning tool." } }, { "@type": "Question", "name": "Is formal account planning worth the effort for every client", "acceptedAnswer": { "@type": "Answer", "text": "relationship?\nGenerally reserved for the firm's most strategically important\naccounts, where the effort of building and maintaining a formal plan is\nclearly justified by the account's actual or potential scale." } }] }

Subscriber access

Unlock this playbook

This playbook — including every framework, template, and step-by-step section — is available free to Think Insights subscribers. Enter your email to unlock it instantly and get

our weekly insights newsletter. No account needed, and access is remembered on this device.

First Name

Last Name

Email

Country - Select -

■ I agree to data processing in accordance with GDPR

Submit

Leave this field blank

References

Related playbooks

Consulting

Advisory-Led Consulting Sales Playbook

A framework for consulting business development that treats the sales conversation itself as genuine advisory work — offering real insight and value before any

- Practitioner
- Intermediate
- Template Included

Read playbook

Consulting

Consulting Brand Authority & Market Positioning Playbook

A framework for building consulting firm brand authority and market positioning specific enough that prospects and referral sources can clearly articulate what

- Executive
- Intermediate
- Template Included

Read playbook

Consulting

End-to-End Consulting Engagement (From Pitch to Delivery)

A five-phase spine for running consulting engagements end to end — pitch, contract, mobilize, deliver, and close — with the templates and governance rhythm to k

- Practitioner
- Intermediate

Read playbook

Talk to us about account planning

Tags

- Account Planning
- Client Management
- Consulting Operations

Author

Mithun A. Sridharan Thought Leader

I'm Mithun A. Sridharan, Founder of this website - Think Insights - on Strategy, Management Consulting, Leadership, Digital Transformation, and Data Literacy. Follow me on social media or connect with me on LinkedIn for updates.