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

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- 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.

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where the effort of building and maintaining a formal plan is\nclearly justified by the account's actual or potential scale." } }] }

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