

Handout 9 - KAM plan evaluation guidelines

Plan element	Reference sections	Level 1	Level 2	Level 3	Level 4	Level 5
Overall business issues presentation	Executive summary	Excellent understanding of KAM Complete, coherent Addresses key issues Appropriate emphasis Focused and clear Creative	Good understanding of KAM Mostly complete, some visible coherence. Addresses key issues Clear	Acceptable understanding of KAM Essential components No significant contradictions or omissions	Weak understanding of KAM Significantly incomplete or incoherent	Little or no understanding of KAM Incomplete and/or includes major contradictions
Analyses, esp. Market map	Outline Section B, Customer Appendices	Comprehensive and effective use of tools Valid conclusions drawn Deep understanding of customer	Significant and effective use of tools Illustrates main points of customer situation	Some use of tools Elucidates key issues facing customer	Little use of tools Does not draw valid conclusions	Little or no use of tools No collusions, poor customer understandings
Objectives	Your plans	Realistic Joined up with customer situation, customer and supplier strategies	Realistic Connects current situation and supplier strategies	Statement building from current situation	Unclear or not well connected to situation	Not states, or just sales targets
Strategy	Your plans	Clearly stated Targeted Added value for customer Feasible, clear resource requirement Consistent with objectives	Clearly stated Targeted Added value for customer Feasible, clear resource requirement Consistent with objectives	Clearly stated Targeted Added value for customer	Strategy simply stated	Strategy not stated, and/or stated strategies are outcomes or actions
Action	Your plans	12 month development 3 year major action Matched with strategy Thorough measurement framework	12 month development 3 year major action Matched with strategy Thorough measurement framework	12 month development Limited measurement framework	Short-term action Measurement is just sales targets	Short-term action No control mechanism