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SMART

SMART BUSINESS RANGE

Key Account Director

Run the book like it matters.

KEY ACCOUNTS

The accounts that pay for everything

A book is not a list

Your top accounts deserve a running record: momentum, relationship health, renewal risk, and the next meaningful move. If it lives only in your head, it isn't managed — it's remembered. Fill one block per key account and revisit monthly.

ACCOUNT 1 — NAME, OWNER CONTACT, RENEWAL DATE

MOMENTUM & RELATIONSHIP HEALTH (HONEST READ)

NEXT MEANINGFUL MOVE — AND BY WHEN

ACCOUNT 2 — NAME, OWNER CONTACT, RENEWAL DATE

MOMENTUM & RELATIONSHIP HEALTH (HONEST READ)

NEXT MEANINGFUL MOVE — AND BY WHEN

ACCOUNT 3 — NAME, OWNER CONTACT, RENEWAL DATE

MOMENTUM & RELATIONSHIP HEALTH (HONEST READ)

NEXT MEANINGFUL MOVE — AND BY WHEN

PORTFOLIO & RISK

See the whole board

Lay the portfolio out and look for the quiet signals: going silent, single-threaded relationships, slipping engagement. The account most at risk is rarely the one already flagged red.

ACCOUNT	STATUS	QUIET SIGNALS	THIS WEEK'S MOVE

MY TARGETS

The number, decomposed

MY NUMBER THIS QUARTER — AND THE GAP TO IT

WHERE THE GAP MOST CREDIBLY CLOSES (WHICH ACCOUNTS)

WHAT I'M RELYING ON THAT ISN'T YET COMMITTED

OBJECTION HANDLING

Pre-decided, not improvised

Anchor on value, not price

The objections you'll face this quarter are predictable — price at renewal, budget freezes, a rival's discount, 'we're reviewing suppliers'. Decide your position before you're in the room. For each: the concern underneath it, your anchor, and the concession you'll trade (never give) if needed.

OBJECTION	CONCERN UNDERNEATH	MY ANCHOR	TRADE, NOT GIFT

QUARTERLY BENCHMARK

Face the quarter honestly

WHAT GENUINELY GREW THIS QUARTER — AND WHY

WHAT SLIPPED — AND THE HONEST REASON

THE ONE RELATIONSHIP I UNDER-INVESTED IN

WORKING WITH AI

Prompts for the account book

Built on the 4Ds

Give the AI a role, real context, a constraint, and ask for its reasoning. Never paste client data you're not permitted to — anonymise if in doubt. Treat answers as a well-read colleague's view, tested against what you actually know.

Spot the account most at risk

DISCERNMENT

For a second read on which relationship is quietly slipping.

You are a seasoned account director. Here's my portfolio at a glance: "[each account's momentum, renewal date, health, recent signals]". Which is most at risk of churn, and why? Look past obvious red flags to the quiet ones — going silent, single-threaded, slipping engagement. Show your reasoning and give me the one conversation to have this week.

Why this shape: pointing it at quiet signals gets past accounts already flagged red to the ones drifting unnoticed.

Rehearse a tough objection

DELEGATION

To practise a pricing or renewal pushback before you're in the room.

Play a tough but fair procurement lead: "[the account, deal, and expected objection]". Push me realistically over three or four exchanges. Then step out of role: where did I concede too early, where could I have anchored on value, and what one phrase would have strengthened my position? Be candid.

Why this shape: live role-play builds the reflex, and the structured critique turns practice into a usable lesson.

Plan with intention. Execute with precision.