

# Key Account Management In Financial Services Tools And Techniques For Building Strong Relationships With Major Clients

**Handbook of Chinese Management** - Check-Teck Foo 2023-09-05

This handbook explores the theme of managing inside China and consists of chapters that communicate the major managerial concepts within the context of Mainland China. Its key emphasis is to clearly highlight the differences in the art of managing in China vs. the West, while acknowledging that these differences may be narrowing as a result of globalization. Chapters in the book elaborate on how management is affected as China experiences rapid change while some aspects of Chinese culture remain unchanged and steeped in tradition. The book goes further in exploring this complexity by juxtaposing China's orientation towards interpersonal relations, or "guanxi", with the government's emphasis on law, which is now becoming more rule-based than before. Business & Management academics and practitioners will gain useful insight into Chinese management practices and their contrast to established Western ones when they use the Handbook of Chinese Management as a reference.

**Epz Key Account Management in the Financial Services Industry** - Peter Cheverton 2005-01-01

*Book Review Index* - 2006

Every 3rd issue is a quarterly cumulation.

**Key Account Management in Financial Services** - Peter Cheverton 2004

Peter Cheverton's Key Account Management (3rd edition 2004) has established itself as the leading book on the subject. The idea for this new book was prompted by the huge up-take for his KAM Masterclass seminars and workshops from sales and marketing people in FS companies all over the world. It follows a similar structure to the original book, but offers specific advice on marketing and selling financial products, with real-world examples and case studies from FS companies around the globe. Compiled from original in-depth research and interviews, the book is divided into seven parts and is designed to take the reader through the process of understanding, analysis, planning, implementation and performance monitoring, so it can be used as a 'before, during, and after' guide to practical implementation. With areas covered such as the changing environment in financial services; the buying process; competitor replacement strategies; identifying key accounts; meeting the customer's needs; E-commerce and the Internet; and management of non key accounts, this book is a must-have for anyone working or studying in this field.

*InfoWorld* - 1997-05-26

InfoWorld is targeted to Senior IT professionals. Content is segmented into Channels and Topic Centers.

InfoWorld also celebrates people, companies, and projects.

**Customer Relationship Management** - V. Kumar 2018-05-15

This book presents an extensive discussion of the strategic and tactical aspects of customer relationship management as we know it today. It helps readers obtain a comprehensive grasp of CRM strategy, concepts and tools and provides all the necessary steps in managing profitable customer relationships. Throughout, the book stresses a clear understanding of economic customer value as the guiding concept for marketing decisions. Exhaustive case studies, mini cases and real-world illustrations under the title "CRM at Work" all ensure that the material is both highly accessible and applicable, and help to address key managerial issues, stimulate thinking, and encourage problem solving. The book is a comprehensive and up-to-date learning companion for advanced undergraduate students, master's degree students, and executives who want a detailed and conceptually sound insight into the field of CRM. The new edition provides an updated perspective on the latest research results and incorporates the impact of the digital transformation on the CRM domain.

**Computer Engineering: Concepts, Methodologies, Tools and Applications** - Management

Association, Information Resources 2011-12-31

"This reference is a broad, multi-volume collection of the best recent works published under the umbrella of computer engineering, including perspectives on the fundamental aspects, tools and technologies, methods and design, applications, managerial impact, social/behavioral perspectives, critical issues, and emerging trends in the field"--Provided by publisher.

**Proceedings of the XIII International Symposium SymOrg 2012: Innovative Management and Business Performance** - Maja Levi-Jakšić 2012-06-03

**InfoWorld** - 1997-05-19

InfoWorld is targeted to Senior IT professionals. Content is segmented into Channels and Topic Centers. InfoWorld also celebrates people, companies, and projects.

**Customer Relationship Management** - Srivastava Mallika

With the aim of developing a successful CRM program this book begins with defining CRM and describing the elements of total customer experience, focusing on the front-end organizations that directly touch the customer. The book further discusses dynamics in CRM in services, business market, human resource and rural market. It also discusses the technology aspects of CRM like data mining, technological tools and most importantly social CRM. The book can serve as a guide for deploying CRM in an organization stating the critical success factors. KEY FEATURES • Basic concepts of CRM and environmental changes that lead to CRM adoption • Technological advancements that have served as catalyst for managing relationships • Customer strategy as a necessary and important element for managing every successful organization • CRM is not about developing a friendly relationship with the customers but involves developing strategies for retention, and using them for achieving very high levels of customer satisfaction • The concept of customer loyalty management as an important business strategy • The role of CRM in business market • The importance of people factor for the organization from the customer's perspective • Central role of customer related databases to successfully deliver CRM objectives • Data, people, infrastructure, and budget are the four main areas that support the desired CRM strategy

**Automotive News** - 2006

**Key Account Management** - Peter Cheverton 2015-02-03

An organization's key accounts are its lifeblood. Key account management focuses on the long-term investment of resources in customers that can offer an exceptional return on resources. But which are the key accounts? Are they the ones growing the fastest? The ones that are most financially secure? Or are they the ones that shout the loudest? Key Account Management puts forward a straightforward and effective planning methodology. This fully updated 6th edition of Key Account Management takes a long-term, team-selling strategic view of the whole process, from defining the customer, to managing the relationship and achieving key supplier status. With coverage of latest best practice including IT's role in account management, plus new case studies, online supporting resources and a new section comparing how different industries/markets approach key account management, it stands alone as the premier book on managing key customers. Online resources include helpful templates, guides for students and lecturers, and self tests to ensure that best practice is being followed.

**Computerworld** - 1996-09-09

For more than 40 years, Computerworld has been the leading source of technology news and information for IT influencers worldwide. Computerworld's award-winning Web site (Computerworld.com), twice-

monthly publication, focused conference series and custom research form the hub of the world's largest global IT media network.

Redefining Management Practices and Marketing in Modern Age - Dr.Dilip B. Patil 2014

**Managing Customers Profitably** - Lynette Ryals 2009-01-22

This book is a response to a need in the market place in the fast-growing field of customer profitability analysis and the profitable management of customer relationships. It combines innovative approaches to calculating the value of customers, with the management strategies necessary to make and keep customers profitable. It includes easy-to-follow instructions on how to calculate customer profitability, including worked examples (non-technical) and discusses strategies and their applications for organizations to manage customers profitably. Based on cases and feedback from the KAM Club and other research, there will be many business-to-business as well as business-to-consumer examples. The book assumes some level of numeracy in its readership. The contents include: Assessing product costs, costs to serve and how these can be estimated, and how to deal with customer-specific overhead costs. It discusses the uses and limitations of the use of customer profitability analysis, and illustrates how to calculate customer lifetime value using two methods, one with actual numbers and one which estimates relative customer lifetime value. Provides an innovative approach to calculating the lifetime value of a customer by taking risk into account. Demonstrates how to recognise and value the relationship benefits of customers, such as word of mouth. Brings into discussion the idea that how customers are managed, links to their profitability. Describes how financial portfolio analysis and theory apply to marketing and how, their application to marketing relates to the optimisation of marketing spend.

**Managing Marketing** - Thomas V. Bonoma 1984

Key Account Management in the Financial Services Industry - Peter Cheverton 2004-11-03

Peter Cheverton's Key Account Management (3rd edition 2004) has established itself as the leading book on the subject. The idea for this new book was prompted by the huge up-take for his KAM Masterclass seminars and workshops from sales and marketing people in FS companies all over the world. It follows a similar structure to the original book, but offers specific advice on marketing and selling financial products, with real-world examples and case studies from FS companies around the globe. Compiled from original in-depth research and interviews, the book is divided into seven parts and is designed to take the reader through the process of understanding, analysis, planning, implementation and performance monitoring, so it can be used as a 'before, during, and after' guide to practical implementation. With areas covered such as the changing environment in financial services; the buying process; competitor replacement strategies; identifying key accounts; meeting the customer's needs; E-commerce and the Internet; and management of non key accounts, this book is a must-have for anyone working or studying in this field.

QFinance - 2009-10-13

Compiled by more than 300 of the world's leading professionals, visionaries, writers and educators, this is THE first-stop reference resource and knowledge base for finance. QFINANCE covers an extensive range of finance topics with unique insight, authoritative information, practical guidance and thought-provoking wisdom. Unmatched for in-depth content, QFINANCE contains more than 2 million words of text, data analysis, critical summaries and bonus online content. Created by Bloomsbury Publishing in association with the Qatar Financial Centre (QFC) Authority, QFINANCE is the expert reference resource for finance professionals, academics, students, journalists and writers. QFINANCE: The Ultimate Resource Special Features: Best Practice and Viewpoint Essays - Finance leaders, experts and educators address how to resolve the most crucial issues and challenges facing business today. Finance Checklists - Step-by-step

guides offer problem-solving solutions including hedging interest-rate risk, governance practices, project appraisal, estimating enterprise value and managing credit ratings. Calculations and Ratios - Essential mathematical tools include how to calculate return on investment, return on shareholders' equity, working capital productivity, EVA, risk-adjusted rate of return, CAPM, etc. Finance Thinkers and Leaders - Illuminating biographies of 50 of the leading figures in modern finance including Joseph De La Vega, Louis Bachelier, Franco Modigliani, Paul Samuelson, and Myron Scholes Finance Library digests - Summaries of more than 130 key works ranging from "Against the Gods" to "Portfolio Theory & Capital Markets" and "The Great Crash". Country and Sector Profiles - In-depth analysis of 102 countries and 26 sectors providing essential primary research resource for direct or indirect investment. Finance Information Sources - A select list of the best resources for further information on finance and accounting worldwide, both in print and online, including books, journal articles, magazines, internet, and organizations Finance Dictionary - A comprehensive jargon-free, easy-to-use dictionary of more than 9,000 finance and banking terms used globally. Quotations - More than 2,000 business relevant quotations. Free access to QFinance Online Resources (www.qfinance.com): Get daily content updates, podcasts, online events and use our fully searchable database.

Key Account Management - Diana Woodburn 2012-11-13

"This book is crammed with distilled, practical wisdom for key account managers and their directors. Organizations claiming to practise key account management should equip everyone involved with a copy, so they really understand what they are supposed to be doing. Anything less is just old-fashioned selling." Developing successful business-to-business relationships with more customers in highly competitive markets requires processes and skills that go beyond traditional selling activity. The very best state-of-the-art strategies are set out clearly in this book by intentionally known authors who have worked at the highest levels with more key and strategic account managers worldwide than probably any other leading advisors. Based on the hugely influential KEY CUSTOMERS it looks at: Why has account management become so critical to commercial success? What are the key challenges and how do successful companies respond? What part does key account management play in strategic planning? How do companies build profitable relationships with their customers? How does key account management actually work? What does a successful key account manager look like and what skills does he/she need? How should key account managers be evaluated and rewarded? How do companies achieve key account management? By addressing these key questions Woodburn and McDonald provide tools and processes for success honed by tough consultancy projects with the boards of some of the world's leading companies. The book stresses the elements that really matter - from developing a customer categorization system that really works and analyzing the needs of key accounts; to understanding the new skills required by key account managers and ensuring that key account plans are implemented. The 'real world' approach is backed by tested principles and the latest research from the renowned Cranfield School of Management. Key Account Management comes from authors who have taught leading companies how to approach their most powerful and demanding customers and still make money. It is essential reading for all senior management with strategic responsibility, for key or strategic account directors, and for marketing and sales executives. The clear and authoritative approach also makes it an outstanding text for the serious MBA and executive student as well as business-to-business company directors and key account managers.

Plunkett's Advertising & Branding Industry Almanac 2007: Advertising & Branding Industry Market Research, Statistics, Trends & Leading Companies - Plunkett Research Ltd 2007-04

A market research guide to the advertising and branding industry and a tool for strategic planning, competitive intelligence, employment searches or financial research. It contains trends, statistical tables, and an industry glossary. It includes profiles of advertising and branding industry firms, which provides addresses and phone numbers.

## Key Account Management In Financial Services Tools And Techniques For Building Strong Relationships With Major Clients:

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