



Customer 360: Protecting Valuable Relationships



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In this article, which is part of my *AI-Enabled Sales Management* series, we examine the importance of monthly reviews in protecting your most valuable customer relationships. This involves taking a close look at the relationship between salespeople and their Top Ten Key Accounts.

We've all experienced the disappointment in learning that one of our Top Ten Accounts is switching to a competitor. There is a practical way to avoid key customer churn. First you must understand that you need to show your customers what you do to support them. **Meet with your client's decision-makers annually for a comprehensive review of ongoing activities that you execute on their behalf.** I call this a Customer 360 Meeting.

Customer 360 Meetings

A Customer 360 Meeting is an annual event during which all points on the circle of your relationship with your customer are discussed. I suggest you have a Customer 360 meeting with each of your Top Ten Accounts.

Three key meeting components
A 360 Meeting should include these three key components:

1. **Account Support Activity.** Use AI to collect call reports. Then have AI list these by date and the activities and cost reductions your company has executed to support your partnership during the last two years. This gives the customer detail on the time and effort you have invested to keep their business running smoothly.

This section should include technical support calls, emergency deliveries, training sessions provided, custom solutions developed, problem-solving initiatives, and cost-saving recommendations implemented.

2. **Sales History.** Be transparent with your sales history. Openly review the last two years of sales. AI can provide annual and year-to-date total sales broken down by category, including totals for deliveries, invoices, back orders, and sales rep visits.



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Data transparency demonstrates your commitment to the relationship. It reveals trends in customer purchasing patterns, identifies optimization opportunities, and showcases the full scope of your partnership.

3. New Action Plan. Developing a new action plan is your opportunity to collaborate with the customer on growing their business using your consultative abilities. Transparency in account support activity and sales history encourages customers to share new insights about their business challenges and opportunities.

This is your time to listen actively so that you understand the customer's evolving needs. You need to identify new ways to add value and align your offerings with the customer's strategic goals. Remember to commit to specific actions and timelines.

From transactional to strategic

Customer 360 meetings deepen partnerships and can transform your relationship from transactional to strategic. Don't wait for problems to emerge or competitors to attack. Engage in activities that proactively demonstrate product or service value and build trust.

Customer 360 Meetings serve multiple critical purposes:

- They defend against competition by making switching costs psychologically higher.
- They reveal revenue growth opportunities through open dialogue.

- They provide early warning signals when customer engagement changes, and
- They elevate you from vendor to trusted advisor.

A strategic investment

Customer 360 Meetings help retain customers and represent a strategic investment in your most valuable relationships. In today's competitive marketplace, retaining key accounts is just as important as acquiring new ones—and often more profitable.

Use AI to compile comprehensive account activity data. Then be transparent in its presentation so that you can collaborate with your customers on future growth strategies. In this way you can transform routine account management into strategic partnership building. Your customers will see and appreciate the extraordinary effort you invest in their success.

The question isn't whether you can afford to implement Customer 360 Meetings—it's whether you can afford not to. In my 50+ years of sales management experience, I've watched too many "secure" relationships disappear to competitors simply because we failed to show customers the value we were consistently delivering.

Don't let your best customers become someone else's success story. Show them the full picture, and they'll never want to look elsewhere.

5 KEY TAKEAWAYS

1. Don't let your best customers become someone else's success story.
2. Show your client's decision-makers the comprehensive, ongoing activities that you execute to maintain your relationship with them.
3. A Customer 360 Meeting is an annual event during which all points on the circle of your relationship with your customer are discussed.
4. Three key meeting components are account activity, sales history, and a new action plan.
5. Customer 360 meetings transform routine account management into strategic