WHERE VALUE LIVES

Chapter 13 Companion Resource

STRATEGIC GOVERNANCE PLANNER

Create a rhythm that keeps attention, relevance and mutual value alive.

Governance is how attention keeps an appointment.

Use this planner with one live strategic account to separate operational from strategic governance, design the right cadence, improve agendas, surface weak signals, review mutual value and make governance produce decisions rather than slides.

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Supporting Chapter 13 – The Rhythm of Strategic Governance

1. Governance Health Check

Strategic relationships often drift before they visibly fail. Use this page to identify whether your current governance is maintaining relevance or merely maintaining meetings.

Diagnostic question	Evidence	Risk / implication
Are meetings producing insight, decisions or action?		
Is the customer sharing more, the same, or less than before?		
Are senior stakeholders becoming easier or harder to reach?		
Are innovation and future-value conversations active?		
Do we hear about important customer changes early enough?		
Are account discussions becoming dominated by renewal and operational issues?		
Are commitments visible and followed through?		
Is value being delivered but not recognised?		

Drift Signals

Weak signal	Present?	Evidence / next question
Stakeholder less responsive		
Senior sponsor changed or left		
Repeated service issues		
Procurement involvement increasing		
More benchmarking questions		
Innovation conversations drying up		
Customer polite but less open		
Internal concern about profitability		

2. Operational or Strategic?

Operational governance asks whether things are working. Strategic governance asks whether the relationship is still creating value that matters. Both are necessary; neither should crowd out the other.

Current governance item	Operational / Strategic / Both	Why it matters	Right forum
Service performance			
Open issues and complaints			
Customer priorities and changes			
Recognised value evidence			
Future opportunities / innovation			
Relationship risks			
Mutual investment decisions			
Strategic alignment			
A supplier can be operationally competent and strategically irrelevant.			

Rebalance Decision

What should we STOP reviewing here?	What should we START discussing?	What should move to another forum?

3. Design the Five-Layer Governance Cadence

There is no universal frequency. Design the rhythm around the relationship, but make sure each layer has a distinct purpose.

Layer	Suggested rhythm	Purpose	Participants / owners	Outputs
1. Operational pulse	Weekly / fortnightly	Delivery, issues, short-term risks and actions		
2. Internal account team review	Usually monthly	Join up supplier insight, commitments, risks and escalation		
3. Customer value review	Usually quarterly	Mutual value, recognised outcomes, friction and future value		
4. Executive alignment conversation	Often twice yearly	Direction, major priorities, barriers, decisions and vulnerability		
5. Annual joint value & innovation review	Annual	Refresh value evidence, priorities, innovation and next account plan		

Cadence Design Test

Question	Answer
Which layer is currently missing?	
Which layer duplicates another?	
Where is strategic discussion being swallowed by reporting?	
Where does the customer need more / less attention?	
What event should trigger an extra governance conversation?	

4. Build a Strategic Agenda

The agenda tells people what kind of conversation to have. If it contains only updates, metrics and open actions, it will produce reporting rather than thinking.

Strategic agenda question	Preparation / evidence	Decision or conversation required
1. What has changed in the customer's world?		
2. What value have we delivered and what has been recognised?		
3. Where are we creating friction or risk?		
4. What decisions or support do we need from each organisation?		
5. What future value should we explore next?		

Slide Deck Test

Slide / information item	Creates insight?	Supports decision?	Supports action?	Keep / pre-read / remove
If a slide does not help create insight, decision or action, it is probably furniture.				

5. Mutual Value Review

Strategic governance should periodically ask whether the relationship is creating value for both organisations, and whether that value is recognised.

Value dimension	Customer value	Supplier value	Evidence	Balance / concern
Performance / outcomes				
Risk / resilience				
Capability / learning				
Innovation / insight				
Commercial value				
Strategic positioning / future				

Mutual Value Questions

Question	Evidence / answer
What are we each gaining from this relationship?	
Where is one side investing more than the other?	
Where is value being created but not recognised?	
Where are expectations becoming unrealistic?	
Where should we deepen the relationship?	
Where should we simplify it?	

6. Decision and Attention Log

Good governance creates strategic memory. Record decisions, commitments, emerging risks and attention requirements so the relationship does not depend on individual memory.

Date / forum	Decision or commitment	Owner	By when	Evidence / status

Attention Triggers

Trigger	Why it matters	Who needs attention?	Next move
Customer priority changed			
Value delivered but not recognised			
Relationship risk emerging			
Barrier needs senior intervention			
Innovation opportunity emerging			
Customer openness / access declining			

7. 90-Day Governance Reset

Period	Governance action	Owner	Evidence of progress
Days 0–30	Remove duplication; clarify operational vs strategic forums; define cadence and owners.		
Days 31–60	Introduce strategic agendas, mutual-value evidence and decision tracking.		
Days 61–90	Review effectiveness with the customer; adjust rhythm; capture lessons and weak signals.		

Final Challenge

If we stopped holding our current governance meetings tomorrow, what strategic value would the customer actually miss?

AI Prompt – Strategic Governance Reviewer

Act as a sceptical Strategic Account Management governance reviewer.

Using only the information I provide, assess whether our current governance keeps strategic attention and customer relevance alive or merely maintains a meeting schedule.

Separate OPERATIONAL GOVERNANCE from STRATEGIC GOVERNANCE.

Evaluate:
- current cadence and forums;
- customer-world changes;
- recognised value;
- mutual value;
- relationship risks and weak signals;
- decisions and commitments;
- executive attention;
- future-value and innovation conversations.

Classify important statements as DIRECT EVIDENCE, REASONABLE INFERENCE, ASSUMPTION or UNKNOWN.

Identify duplicated meetings, missing governance layers, reporting that should become pre-read, unresolved decisions, weak signals, unrecognised value and areas where the relationship may be drifting from strategic to familiar.

Then propose:
1. a five-layer governance cadence;
2. a strategic customer-value-review agenda;
3. attention triggers;
4. a 90-day governance reset.

Do not invent customer priorities, opinions, commitments, outcomes or risks.

Finish by answering:
“Is our governance protecting strategic relevance, or simply proving that meetings occurred?”