WHERE VALUE LIVES

Chapter 15 Companion Resource

STRATEGIC ACCOUNT INVESTMENT CASE

Choose where scarce attention can create the greatest mutual future value.

The question is not: “Could this account benefit from more attention?” It is: “Does this account justify more attention than the alternatives?”

Use this workbook to make an explicit investment decision: deepen, grow, repair, maintain, simplify, incubate or stop pretending the account is strategic.

1. The Investment Question

The core decision is where scarce organisational attention will create the greatest mutual value. Revenue, noise, political convenience and fear of saying no are not sufficient reasons.

Investment question	Evidence / answer
What value could we create for the customer?	
What value could the customer create for us?	
Why does this account deserve attention more than the alternatives?	
What customer-side commitment exists?	
What resources would be required?	
What evidence would show that the investment is working?	
What would we have to reduce, standardise, automate, simplify, delay or stop to free the attention?	

2. Mutual Future Value Test

Criterion	Evidence	Strength: High / Medium / Low	Implication
Future value for the customer			
Future value for us			
Strategic fit			
Customer access and openness			
Customer willingness to engage beyond price			
Customer participation in governance			
Recognition of value created			
Cross-functional opportunity			
Executive relevance			
Sustainable economics / cost to serve			
Partnership is participative. A customer that wants strategic support must help create the conditions for strategic support.			

3. Customer Readiness to Earn Investment

Strategic investment is not determined by supplier ambition alone. Assess whether the customer behaves in ways that make deeper collaboration possible.

Customer behaviour	Evidence now	Ready / Not yet / No	Required change
Provides meaningful access			
Shares context and changing priorities			
Engages beyond price			
Participates in governance			
Recognises value when it is created			
Allows honest challenge and difficult conversations			
Supports cross-functional contact where needed			
Commits time and attention to joint priorities			

Readiness Judgement

Question	Answer
Is the customer ready for strategic investment now?	
If not, are they 'not yet' ready and worth selective incubation?	
What specific customer-side behaviour would change the decision?	

4. Choose the Investment Posture

Do not default every important account to 'grow'. The right investment posture depends on evidence.

Posture	Use when...	What the investment should focus on	Our decision
Deepen	Mutual value is strong and access/commitment support a broader strategic relationship.	More senior attention, cross-functional value creation, joint priorities, innovation.	
Grow	The relationship is healthy and there is credible, customer-relevant expansion potential.	Growth opportunities tied to recognised customer value.	
Repair	The account is attractive but damaged by service, trust, perception or overpromising.	Trust recovery, service stabilisation, honest commitments, governance and evidence of changed experience.	
Maintain	The relationship is worthwhile but does not justify disproportionate strategic attention.	Reliable service, efficient relationship management, protect economics.	
Simplify	Attention/cost to serve is too high relative to mutual value.	Standardise, automate, reduce exceptions and unnecessary bespoke support.	
Incubate	Potential exists but the customer or opportunity is not yet ready.	Selective attention to test readiness without romantic over-investment.	
Exit / De-strategise	The account no longer justifies strategic status or investment.	Release scarce attention and manage transition professionally.	

You cannot repair trust with a slide deck. Trust is repaired through repeated evidence that the customer's experience has changed.

5. The Opportunity-Cost Test

Every strategic investment consumes attention that cannot be used elsewhere. Make the trade-off visible.

Resource / attention	What this account asks for	What it displaces elsewhere	Is the trade-off justified?
Executive time			
Account-team time			
Technical / specialist support			
Innovation capacity			
Operational flexibility			
Commercial concessions			
Cross-functional goodwill			

Stop-Doing Decision

To invest here, what will we...	Specific action
Reduce	
Standardise	
Automate	
Simplify	
Delay	
Stop	

6. Strategic Account Investment Case

Case element	Decision / evidence
Recommended investment posture	
Why this account merits this posture	
Customer-recognised value we intend to create	
Value we expect to receive in return	
Customer-side commitments required	
Internal resources required	
Risks / constraints	
Evidence that would show progress	
90-day decision points	
What we will stop or reduce to fund this investment	

Decision

Decision	Select / explain
APPROVE deeper strategic investment	
APPROVE repair investment only	
MAINTAIN current attention	
INCUBATE and review later	
SIMPLIFY / reduce attention	
DE-STRATEGISE / exit	

7. 90-Day Investment Plan

Period	Action	Owner	Evidence / checkpoint
Days 0-30	Validate mutual future value, customer readiness and resource requirement.		
Days 31-60	Agree customer-side commitments and begin the chosen investment posture.		
Days 61-90	Review evidence, opportunity cost and whether the account still justifies the investment.		

Final Challenge

Where will our scarce attention create the greatest mutual value - and what are we prepared to stop doing in order to invest there?

AI Prompt - Strategic Investment Reviewer

Act as a sceptical Strategic Account Management investment reviewer.

Use ONLY the evidence I provide.

Assess whether this account justifies additional strategic attention relative to alternatives.

Evaluate:
- mutual future value;
- customer-recognised value potential;
- strategic fit;
- customer access and openness;
- customer willingness to participate;
- economics and cost to serve;
- resource requirement;
- opportunity cost;
- trust / delivery health;
- evidence quality.

Classify every major conclusion as:
DIRECT EVIDENCE
REASONABLE INFERENCE
ASSUMPTION
UNKNOWN

Do not invent customer commitment, strategic potential, commercial value or relationship quality.

Recommend one posture:
DEEPEN
GROW
REPAIR
MAINTAIN
SIMPLIFY
INCUBATE
DE-STRATEGISE / EXIT

Explain why.

Then identify:
1. What value we could create for the customer.
2. What value the customer could create for us.
3. What customer-side commitments are required.

4. What internal resources are required.
5. What must be reduced, standardised, automated, simplified, delayed or stopped to free the attention.
6. What evidence would show progress within 90 days.
7. What evidence would cause us to reverse the investment decision.

Finish with:
“Does this account justify more attention than the alternatives?”