

WHERE VALUE LIVES

Chapter 7 Companion Resource

STRATEGIC RELATIONSHIP QUALIFICATION DIAGNOSTIC

Test whether an important customer relationship is genuinely becoming strategic - and whether both sides would recognise the change.

"An important customer matters to us. A strategic relationship matters to both sides."

Fred Mills, Where Value Lives

Chapter 7 warns against mistaking internal declaration for external reality. A CRM label, executive sponsor or longer account plan does not make a relationship strategic. Use this diagnostic to look for evidence of mutual importance, privileged understanding, meaningful access, a shared value agenda and future orientation.

Fred Mills, FCIM, MBA

1. Important to Us - Strategic to Them?

Begin with the uncomfortable distinction. Record why the customer matters to you, then look separately for evidence that you matter strategically to them.

Why this customer matters to us	Evidence we matter to them	Evidence we may still be 'just a supplier'

Reality check

If our internal 'strategic account' label disappeared tomorrow, what customer behaviour would still prove that the relationship is strategic?

2. Five Signs of a Strategic Relationship

Score each sign from 1 (little evidence) to 5 (strong evidence). Do not score aspiration. Score observable relationship evidence.

Strategic sign	What it means	Score 1-5	Best evidence
1. Mutual Importance	Both sides can explain why the relationship matters and what value it creates.		
2. Privileged Understanding	We understand pressures, priorities, stakeholders, risks, ambitions, constraints and the customer's definition of value.		
3. Meaningful Access	We have relevant access to people who shape priorities, decisions, outcomes and value - not merely senior names.		
4. Shared Value Agenda	Both sides can identify what we are improving, reducing, protecting, building or learning together.		
5. Future Orientation	The relationship includes change, risk, opportunity, innovation and future relevance - not only today's transaction.		

Which of the five signs is weakest, and what does that weakness tell us?

3. Meaningful Access - Not Decorative Access

Access matters only when it improves understanding or the ability to create value. Map the access you actually have.

Stakeholder group	Who?	What do they help us understand?	Quality of access
People who shape priorities			
People who influence decisions			
People who experience outcomes			
People who understand risk			
People who understand the future direction			
People we need access to but do not yet have			

Access question

Where are we mistaking seniority for relevance?

4. The Shared Value Agenda Test

A relationship may be commercially busy without being strategic. Test whether there is a mutual agenda beyond 'sell more'.

Shared-value question	Our current answer	Customer evidence / language
What are we improving together?		
What are we reducing?		
What are we protecting?		
What are we building?		
What are we learning?		
What does success look like for the customer?		
What does success look like for us?		

Which parts of this agenda have actually been discussed with the customer, rather than inferred internally?

5. The Future Orientation Test

Strategic relationships look forward. Use these prompts to test whether the relationship is invited into the customer's unfinished future, or confined to today's requirements.

Future question	What we know	Evidence / source	What we need to learn
What is changing in the customer's world?			
What could disrupt them?			
What will their customers expect next?			
What risks are becoming more important?			
What capabilities will matter next?			
What might we prepare for together?			

Have we been invited into any early, messy or unfinished customer problems? If yes, what does that invitation tell us about trust and relevance?

6. From Supplier to Strategic Contributor

Choose the one relationship shift that would most increase customer-recognised relevance over the next 90 days.

Current relationship reality:

The strongest evidence that the relationship is becoming strategic:

The strongest evidence that it is not yet strategic:

The strategic sign we most need to strengthen:

The customer behaviour we would hope to see change:

The action we will take:

The organisational support required:

How we will know the customer recognises the change:

Owner and review date:

Final question: Are we merely important to ourselves, or are we earning strategic relevance in the customer's world?

Companion resource for Chapter 7 of Where Value Lives

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