B2B CX Management Course for Account Leaders: Buying Committees, Handoffs, Health Scores, Renewal

21 – 25 June 2027
New York

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Programme Summary

B2B CX management is the subject of this one-week training course for heads of customer experience, key accounts and customer success, ending in an account experience pack for one strategic account. Business customers buy through committees, use services through many contacts and renew on the evidence of months, yet many suppliers manage them as a single contact with a single score. The programme moves from the buying committee and account journey to health measures, handoffs and renewal planning. Mars Training Centre UK delivers this programme on B2B CX management to mixed-organisation cohorts.

The Business Case

Suppliers to corporations and public bodies often lose accounts without warning, because the contact who gave good scores was not the person who decided to renew. Managing the whole account gives leaders earlier signals and one shared plan.

- Renewal Rate: Improves when risks are found while there is still time to act.
- Account Growth: Rises when delivery quality is evidenced before an expansion is proposed.
- Escalation Volume: Falls when handoffs between teams are defined and owned.

Principles and Evidence Base

- ISO 10004:2018: Gives guidelines for monitoring and measuring customer satisfaction, applied in Sessions 1 and 3 to the design of account listening.
- Net Promoter Score: Offers a common relationship measure, applied in Session 3 to a survey design for several contacts per account.
- Customer Effort Score: Measures how hard a task felt, applied in Session 3 to service moments such as onboarding.
- Customer Journey Mapping: Shows an experience over time and across teams, applied in Session 2 to the account journey.

Intended Participants

- Customer experience leaders who must extend consumer-style measures to business accounts.
- Key account directors who own the relationship with a small number of large customers.
- Customer success heads who guide adoption, health and renewal.
- Service delivery managers who answer to account teams for performance.

Typical settings include telecommunications, industrial supply, software, banking and government services.

Learning Outcomes

1. Participants will be able to evaluate who buys, uses and decides within a business account.
2. Participants will be able to construct an account journey map across contacts, teams and months.
3. Participants will be able to diagnose the signals that show an account is at risk.
4. Participants will be able to design a handoff standard that keeps one promise across sales, service and customer success.
5. Participants will be able to prioritise accounts and actions by risk and potential.
6. Participants will be able to justify a renewal and growth plan to an executive sponsor.

Programme Structure

Day 1: B2B CX Management Foundations and the Buying Committee

Who buys, who uses and who decides in a business account?

- Buying Committee Role Map
- Stakeholder Influence Grid
- Business and Consumer Journey Contrast Sheet
- Customer Value Statement
- ISO 10004:2018 Monitoring Principles Review

Day 2: Mapping Multi-Contact Account Journeys

What does an account experience across contacts, teams and months?

- Account Journey Map
- Contact-Level Touchpoint Inventory
- Onboarding and Adoption Milestone Plan
- Moment of Truth Register
- Cross-Team Handoff Log

Day 3: Listening to Accounts and Scoring Health

Which signals show an account is at risk before it says so?

- Relationship Net Promoter Score Design Sheet
- Customer Effort Score Reading Guide
- Account Health Score Model
- Feedback Loop Closure Protocol
- Early Warning Signal List

Day 4: Designing Handoffs, Service Reviews and Renewal Plans

How do sales, service and customer success keep one promise to the account?

- Sales-to-Service Handoff Standard
- Joint Account Plan Template
- Service Review Meeting Pack
- Renewal Readiness Checklist
- Expansion Opportunity Screen

Day 5: B2B CX Management Pack for One Strategic Account

Do the earlier tools combine into a pack that a sponsor can approve?

- Applying the Session 1 Buying Committee Role Map
- Testing the Session 2 Account Journey Map
- Checking the Session 3 Account Health Score Model
- Rehearsing the Session 4 Renewal Readiness Checklist
- Completing the Account Experience Pack

Methodology

The programme uses structured exercises built on prepared case material for two accounts, one a hospital group buying managed equipment services and one a manufacturer buying logistics services. Participants work in groups and defend their account plan to peers acting as an executive sponsor.

- Suggested activity: Mapping who really decided a past renewal and comparing it with the contact who scored the service.
- Suggested activity: Rebuilding a health score after removing one flattering measure.
- Suggested activity: Briefing a sponsor on an account that scores well but shows warning signals.

Capstone Output

Each participant completes an account experience pack for one strategic account. It holds a buying committee map, an account journey map, a health score with warning signals, a handoff standard and a renewal and growth plan with owners. The pack is used at work to brief an executive sponsor, and to align account teams.

Frequently Asked Questions

Is a B2B CX management training programme suitable for leaders new to account work?

Yes. B2B CX management is taught through prepared cases and templates. The programme assumes responsibility for customer experience, accounts or customer success, but no earlier work on health scoring.

Which standards and models does B2B CX management rest on?

B2B CX management rests on ISO 10004:2018 for monitoring customer satisfaction, the Net Promoter Score, the Customer Effort Score and Customer Journey Mapping, each applied to prepared account cases.

How is the account experience pack from B2B CX management used at work?

You use the account experience pack to brief your sponsor, to align sales, service and customer success on one plan, and to explain which accounts are acted on first and why.

How does B2B CX management differ from a key account management programme?

B2B CX management concentrates on the experience, health and renewal evidence of accounts across contacts, while a key account management programme concentrates on account selling and revenue planning.