Customer Portfolio Management Course: Value Tiers, Retention Economics and Differentiated Service

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New York

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Programme Summary

Customer portfolio management is the subject of this one-week training course for commercial directors, heads of customer management and senior account leaders, taught at strategic level and ending in a customer portfolio plan. Revenue is rarely spread evenly across customers, yet many organisations give every account the same terms. The programme moves from measuring customer value to tiering, retention economics, differentiated service and a final application. Mars Training Centre UK delivers this programme on customer portfolio management to mixed-organisation cohorts.

The Business Case

Leaders who know which customers create profit, which consume it and which can grow can direct sales effort and service cost where they return most. Where every account is served alike, effort and cost drift towards the largest requests rather than the most valuable customers. The programme works on the measures below.

- Customer Profitability: Improves when accounts are tiered by value and cost to serve.
- Retention of Valuable Customers: Rises when high-value accounts receive a defined service proposition.
- Acquisition Spend: Falls when new-customer targets follow the profile of the best existing accounts.

Principles and Evidence Base

- Customer lifetime value: An economic model of the margin a customer is expected to produce, applied in Sessions 1 and 3 to value accounts and weigh retention against acquisition.
- Johnson and Selnes portfolio of relationship types: A view that customers are managed as a portfolio of different relationships, applied in Session 2 to tier accounts and set the right relationship for each tier.
- Pareto analysis: A method for finding the few accounts that carry most revenue or profit, applied in Session 1 to measure concentration.
- ISO 10004: The international guideline on monitoring customer satisfaction, applied in Sessions 4 and 5 to track whether each tier is served as intended.

Intended Participants

- Commercial directors who allocate sales and service resources across customer groups.
- Heads of customer management who own the segmentation and tiering of accounts.
- Senior account leaders who plan growth and retention for the largest relationships.
- Finance partners who report customer and account profitability.

Typical settings include banking, telecommunications, professional services, industrial supply and wholesale distribution.

Learning Outcomes

1. Participants will be able to evaluate the value and cost to serve of a customer base.
2. Participants will be able to construct customer tiers with clear entry and exit rules.
3. Participants will be able to compare the economics of winning, keeping and growing customers.
4. Participants will be able to design a differentiated service proposition for each tier.
5. Participants will be able to prioritise accounts for investment, maintenance or managed release.
6. Participants will be able to justify a customer portfolio plan to an executive committee.

Programme Structure

Day 1: Measuring Customer Value Across the Portfolio

Which customers create value, and which consume it?

- Revenue and Margin Concentration Curve
- Customer Lifetime Value Worksheet
- Cost-to-Serve Allocation Table
- Share-of-Wallet Estimate
- Customer Data Readiness Checklist

Day 2: Tiering and Relationship Types

How are customers grouped, and what relationship does each tier call for?

- Value and Potential Tiering Matrix
- Relationship Type Selection Guide
- Tier Entry and Exit Rules
- Account Ownership Map
- Tier Migration Tracker

Day 3: Retention and Acquisition Economics

When is it cheaper to keep a customer than to replace one?

- Retention Versus Acquisition Cost Comparison
- Churn and Defection Pattern Review
- Winning Back Lapsed Accounts Plan
- Look-Alike Target Profile
- Investment Threshold by Tier

Day 4: Differentiated Service and Loyalty

What does each tier receive, and how is the promise kept?

- Service Proposition Canvas by Tier
- Service Level Rules by Tier
- Loyalty Benefit Design Sheet
- Satisfaction Monitoring Under ISO 10004
- Managed Release Script for Unprofitable Accounts

Day 5: Customer Portfolio Plan for One Business Unit

Do the findings join into a plan that an executive committee can approve?

- Applying the Session 1 Value Curve
- Testing the Session 2 Tiering Matrix
- Checking the Session 3 Investment Thresholds
- Reviewing the Session 4 Service Propositions
- Completing the Customer Portfolio Plan

Methodology

The programme is a case analysis built on prepared customer datasets from banking, telecommunications and industrial supply. Participants measure value, build tiers, compare economics and design service propositions, then defend the portfolio plan to peers acting as an executive committee.

- Suggested activity: Plotting a revenue concentration curve from a sample customer file.
- Suggested activity: Setting tier entry and exit rules for a business unit.
- Suggested activity: Drafting a managed release conversation for an unprofitable account.

Capstone Output

Each participant completes a customer portfolio plan for one business unit. It holds a value analysis, a tiering matrix, retention and acquisition thresholds, a service proposition for each tier and a monitoring routine. At work it goes to the executive committee for approval and guides how sales and service effort is allocated.

Frequently Asked Questions

Is a customer portfolio management course suitable for leaders without an analytics background?

Yes. This customer portfolio management course is taught at strategic level through prepared datasets and templates. You need responsibility for customers, accounts or commercial resources, but no statistical background.

Which models does the customer portfolio management course rest on?

The customer portfolio management course rests on customer lifetime value, the Johnson and Selnes portfolio of relationship types and Pareto analysis, with ISO 10004 guiding satisfaction monitoring.

How is the plan from a customer portfolio management course used at work?

You take the customer portfolio plan to your executive committee, apply its tiering rules to allocate account effort, and use its service propositions as the standard for each tier.

How does a customer portfolio management course differ from a course on customer segmentation?

A customer portfolio management course concentrates on value, economics and what each tier receives, while a segmentation course concentrates on grouping customers by needs and profile for targeting.