



Strategic Account Review

Terms of Reference

1. **A Strategic Account** does not have an exact definition and countries are permitted to use their judgement in nominating Strategic Accounts.
2. **The guiding criteria for selection for the UK are:**
 - 2.1. Established customer with annual revenue typically more than £5-10m
 - 2.2. Senior business relationships at Executive or CxO level within the customer
 - 2.3. Significant growth opportunities across the breadth of our portfolio
3. **Strategic Accounts are subject to:**
 - 3.1. Focused investment in account management resources, account specific marketing, bid budget and other resources as needed
 - 3.2. Development of an account plan that is reviewed at the Europe region level to ensure the account has the resources and backing needed to achieve its plan
 - 3.3. Participation in NPS survey
 - 3.4. Strategic Account performance against plan is reviewed quarterly in the Management Business Reviews
4. **Purpose of the Strategic Account Review**

The Strategic Account Review is established to:

 - 4.1. Enable the United Kingdom and consequently Europe region to achieve its business objectives by
 - a. Reviewing and interrogating Strategic Account performance to ensure achievement of short-term and long-term business objectives
 - b. Review and agree on the management of opportunities
 - c. Monitor ongoing programmes and SLA status
 - d. Prioritising resource allocation
 - e. Status update on any milestones, risks or issues.
 - 4.2. The key outcome from the Strategic Account Review is to confirm the strategy is agreed for execution.
5. **Membership, Quorum and Attendees***
 - 5.1. The following roles are the members of the Strategic Account Review:
 - a. Head of UK (Chairperson)
 - b. Head of Finance UK (reviewer)
 - c. Other UK / Europe executives
 - 5.2. The following roles shall attend the meeting to present the Strategic Account Review
 - a. Head of Sector (presenter)
 - b. Sector Finance Director (presenter)
 - c. Account Delivery Executive (presenter)
 - d. Account Programme Director (presenter)
 - e. Other Business Unit executives

For the Strategic Account Review to carry out its duties there must be at least two members present. One of which must be the Head of UK or the Head Finance UK.

*Note: Delegates may be provided

6. **Strategic Account Review Agenda and Documentation**
 - 6.1. The **NWE Head of Shared Services** will agree with the **Head of Sales Operations UK** and **UK Head of Finance** the agenda and standardised data and reporting requirements for Strategic Account Review. These will be issued in a standard template Strategic Account Review Presentation for Accounts to use.
 - 6.2. The standard template has 12 slides which shall be addressed in any review (the Minimal Viable Product - MVP). Other material shall be made available as appendices for reference and presentation as required.
 - 6.3. The MVP for presentation shall consist of:
 - a. **Account plan overview**
 - i. Customer profile on a page
 - ii. Account overview on a page

- iii. Key asks to enable
- iv. Key investment asks

b. Customer Insight

- I. Customer stated strategy
- II. Key customer business challenges
- III. Key and Growth stakeholder map
- IV. Key account and opportunity stakeholder mappings against in-focus business challenges

c. Our plan to deliver against the challenges

- I. The 3 year vision
- II. TCV from the next three years across key lines of business and key opportunities
- III. Current FY and MTP year TCV outlook by service line
- IV. Responsible business and sustainability commitment and plans – Our Purpose

- 6.4. Accounts will post their completed presentations to their confidential Microsoft Teams Channel
- 6.5. Actions will be captured locally by the Account rep and addressed off-line
- 6.6. Where there are security clearance requirements due to the nature of the customer, Europe Governance shall ensure that all attendees are suitably cleared and that documentation is sanitized, or stored in a manner consistent with those security requirements

7. The Account Plan has 3 focus lenses, with key themes to be considered shown below:

Focus Lens	Key Themes
Our Customer	<p>Do we understand our customers business, the market they operate in and their challenges?</p> <ul style="list-style-type: none"> Thinking about our customer... <ul style="list-style-type: none"> What do they want/need? What are their challenges & expectations? Who are the key decision makers? How are we building relationships & advocacy? What is their perception of Fujitsu? What are we doing to improve, change or build it? Are we deploying challenger selling and provocations to drive transformation? What are your creative ideas/approaches for growth by extending our reach? Are you thinking short, medium and long term? How do the actions within the account plan lead to the outcomes that our customer is looking to achieve? How can we align to make our customer succeed?
Our Team	<p>Are all in Fujitsu, our teams, our capabilities, our service lines and business development – engaged and aligned?</p> <ul style="list-style-type: none"> How does your account support the sub-sector and country strategies? What is the plan to exploit successes across other accounts/areas? Have you aligned with our capability and delivery teams, and ecosystem partners on what we will sell, how we will deliver it and how we will service/maintain it? Is there a solid commitment from our teams and partners to provide capabilities & capacity? Is there a mutual understanding of risks and dependencies, and agreement on the mitigation plan(s)? Do you have alignment with the finance team on investments, goals, and leading/trailing indicators? Is there alignment with marketing and other needed support services? Are we showing the full value of our team, of the full Fujitsu?
Our Targets	<p>Are we showing a clear, achievable and predictable route to deliver the agreed vision and support Fujitsu's growth?</p> <ul style="list-style-type: none"> What are the numbers for the account, historically and over the MTP period, and do you have a clear and achievable line of sight as to how to succeed? What are the actions that we – as the UK Leadership team - need to take as a result of this session? Are there clear owners and due dates? What do the executive team need to do to support you and your customer? What support needs to be requested from Japan Ltd to support (funding, customer visit) <p>Looking forwards:</p> <ul style="list-style-type: none"> Do you have a dynamic and clear feedback loop into the offerings community, to assure that we are building the right things? Same for partners? <p>...and if we need:</p> <ul style="list-style-type: none"> What might be escalated to me or to Japan Ltd.? How can we prevent or mitigate that? <p>Alternatively, if you want or need an intervention, how should we align to escalate and resolve?</p>

8. Strategic Account Review Frequency and Format

8.1. The timetable for Strategic Account Review shall be agreed with the Head of Shared Services

8.2. Strategic Account Reviews for each account will usually be scheduled quarterly

8.3. The duration for each review will typically be 60 minutes unless a longer duration is requested.

The meetings may be conducted face-to-face or via the latest company approved meeting technology.

Europe Governance Operations will send out the invitations to Strategic Account Reviews on behalf of, and in consultation with the Head of UK.

Effective Dates/Revision Number

Effective Date: 1st April 2023
Last Review Date: 6th February 2023
Next Review Due: 6th February 2023
Version: 01

Change History

Version	Date	Comments
1.0	06/02/23	First definitive version.
1.1	08/02/23	Revised to include strategic account definitions and Presentation MVP description