

10 Ways to Strengthen Annual Account Planning with Introhive

A Checklist for expanding key client relationships and growing your book of business

1

Clarify your account segmentation strategy

Client segmentation should always serve a purpose. Align segments like Top, Gold, or Silver with specific goals (e.g., retention, expansion, cross-sell potential) to drive meaningful strategy.



With Introhive: Leverage real-time engagement trends, whitespace analysis, and relationship strength to identify which clients represent measurable potential based on those goals.

2

Define objectives for each account

Are you defending current revenue or pursuing cross-sell opportunities? Set objectives that align internal teams and which help prioritize resources across your key accounts.



With Introhive: Analyze engagement patterns, relationship scores, and activity to surface growth signals or risk indicators to set informed, strategic goals that match each account's potential. **Want to know more about understanding your current accounts in Introhive's platform?** [Watch this bite-sized video](#)

3

Map and strengthen key relationships

Gain clarity on client org structures by identifying key stakeholders, decision-makers, and influencers.



With Introhive: Use **relationship mapping** to visualize connections, internal connections, and recent engagement to uncover gaps, reinforce key ties, and drive more strategic client engagement.

4

Build cross-functional account teams

Assign the right internal experts by understanding who already has trust and traction with the client across practices or geographies.



With Introhive: Surface relationship strength, frequency of interaction, and past engagement history to build well-connected, strategically aligned account teams.

5

Walk into client meetings ready to add value

Ensure every meeting is focused, relevant, and aligned to the client's priorities with current context at your fingertips.



With Introhive: Sign up for **automated pre-meeting digests** straight into your email inbox showing recent firm activity, stakeholder roles, LinkedIn profiles, and organizational news so you show up informed and prepared to serve as a strategic advisor. **Want to know more about pre-meeting digests?** [Watch this bite-sized video](#)

6

Track engagement over time

Monitor relationship health by identifying shifts in communication frequency, responsiveness, and stakeholder activity.



With Introhive: Use the **Account Activity Trends report** to see how relationship scores are changing, who's engaging with key stakeholders, and which activity patterns (meetings, emails) signal risk or cross-sell opportunity. **Want to know more about staying current with clients in Introhive's platform?** [Watch this bite-sized video](#)

7

Spot gaps and risk early

Missed touchpoints and disengaged stakeholders are early warning signs, but only if you can see them in time.



With Introhive: Use **Signals** to receive proactive alerts about declining engagement, stakeholder silence, or shifts in relationship strength. Signals surface automatically across Introhive's homepage, account pages, CRM panel, browser extension, and pre-meeting briefs so that you can take timely action wherever you're working. **Want to know more about Signals?** [Watch this bite-sized video](#)

8

Identify opportunities for cross-selling

Top accounts often have untapped potential in other service areas.



With Introhive: Segment key accounts by industry, region, or service line to uncover service gaps. Use Introhive's **relationship mapping** to identify where your firm has strong connections but limited service coverage, review engagement history to understand client priorities, and connect with top-engaged colleagues to discuss potential needs or warm paths for expansion. Use Signals to stay informed of stakeholder changes or activity shifts that could support timely outreach.

9

Prospect through trusted relationships

Skip the cold outreach. Identify existing connections to open doors faster.



With Introhive: In the **Relationship Portal**, see top connected colleagues at your key accounts, including the last time they engaged, then use warm paths to reach out with context and credibility. Alternatively, use the Browser Extension to view real-time connection insights while browsing LinkedIn or company websites. **Want to know more about the Relationship Portal?** [Watch this bite-sized video](#)

10

Plan for succession and continuity

Don't let client knowledge walk out the door if key contacts leave.



With Introhive: Ensure account continuity by tracking stakeholder transitions and multi-threading for key accounts. Signals provide proactive alerts so that you don't have to go digging for these insights. When someone announces their departure, use the Colleague Succession Dashboard to identify the best replacement colleagues to identify key contacts at client accounts where departing professionals have strong relationships, pinpoint potential replacements by analyzing relationship capital to understand who might be the best fit.



See first-hand how Introhive's platform supports your growth

[Explore our interactive demo.](#)

