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**Narrative**

Being an strategic account manager for any organization combined many business functions including: Project manager, score keeper, backstop, and cheerleader. SAM’s mindset needs to be the quarterback for the company he represents while many cases also being a middle linebacker on the behalf of the clients. SAM’s work each day in earning the trust of the client and their respective peers by owning the narrative in the account.

Owning the narrative translates in being the single point of contact for all sales strategies, crisis management, and executive peering. In many large accounts, companies will deploy several resources including executives, engineering resources, product teams, support personal, 3rd party partners and distributors. The client needs to see that one “voice” coming from the SAM. When the client questions why “US?”, the SAM needs to be the one delivery that value reason of why. Account management and relationships are critical to gaining trust with the client at multiple levels within their organizations. Strategic accounts grow their business because they learn to develop relationship and business alignments across multiple

departments.

**People:**

SAM’s need to understand how to manage people. Not only his own resources, he needs to be the “listener” to the client. Clients seek a person they can count on when things are not working. In many cases in the account, not everyone is a fan of your product or services. The SAM needs to develop and own the communications plan within the account in insure everyone from his company knows how to communicate, what to communication, and when to communicate. So often, members of support will voice a “opinion” that will cause impacts in the accounts. The SAM needs to insure everyone within his team aligns to the narrative and communications plans before messaging the client.

**Attitude – Culture -**

“We align with client’s requirements before our own. We delivery what we promise, and we are transparent when we don’t. We develop our strategy to be the client’s strategy first.”

**Alignment: Who to Sell to in the account**

Most companies have developed a DEVOPS model based on the book “The Phoenix Project”. No longer do companies rely on the waterfall method of product/business development. In the waterfall method, one stage of a project does not move forward unless the previous have been completed. In the new Agile model, multiple functions are accomplished in sprints and scrum working teams. With the new DEVOPS model, the buying decisions for clients have moved to a **Product/business owner model** and less about the CIO, CFO, and COO making decisions. These product/business owners control the scope, the budget, and the delivery of their portion to the solutions based on their company’s directive. The SAM needs to understand that each department or scrum may have different KPI’s and rules of measurement. Not all departments will think alike or budget correctly in this new world.

**Measurement of Success**

SAM’s as part of the success in the account requires a series of measurements of success or KPI that align to the client’s needs and perceptions. In the world of agile, building a consistent measurement scope and getting each product owner to agree to the framework is always a challenge.

In the book, “Social Physics”, accounting for people’s ideas and their way of processing data is more important the trying to convince the client on using a “industry” standard way of measurement. Being a SAM required you to gather the measurement requirements that align the client’s reporting structure in lieu of trying to get everyone of one method. Each Product/business owner has a dashboard they are reporting. Spending the time to learn that dashboard matrix is critical to finding the correct KPI’s that are useful for the product/business owners.

An example of 3 KPI’s that seems to align with several product owners:

1. **Net promoter score** – Based on the number of product/business/ owners, how many these people would recommend your product, services, and company to other product/business owners.
2. **Case to closure with SLA** – This measurement is critical product/business owners that also delivery of their solutions to their clients. How long does a technical support issues take to get resolved and does the time of resolution fit consistency into the contracting SLA?. Failure in this KPI normally results in competitors being walked into your account.
3. **Product and Feature Delivery-**Products owners consistency look at other vendors seeking solutions for their users. A very critical KPI is the delivery of updates consistent with the code release schedule and alignment with the client’s maintenance and service windows. Many clients have a set freeze time during a quarter or yearend to execute updates and new features. If a vendor is delivery new software and fixes, outside of these windows, or fails to deliver based on a committed schedule. This KPI will show the % of successful delivery and failed delivers as well.

**Leadership**

 The SAM owns the responsibility to develop executive peering relationships between the client and his/her executives. The client executives need to feel they have the ability to call into the President or VP of a company without the need to go through the SAM himself. Many executive peering relationships tend to help during a time of a crisis and many cases, open doors to discover new products.

**Discovery**

The key to discovery of new projects in the account centers 100% around trust. If the client trust’s the SAM and his company, they tend to favor staying with a partner that solve their problems and aligns to their business needs. Companies that maintain a client first mindset, tend to see less RFP’ and competitive selling situations. The SAM needs to help continue to grow that trust with each engagement and crisis issues.

**Quarterly Business Reviews-**

Critical the overall account management, hosting a QBR is critical for both parties to participate in. These quarterly meetings allow leaders from both sides to voice their praise and some cases concerns about the partnership. In many QBR’s, this also gives the SAM access to new leaders from other product groups along with bringing in new solutions ideas to the client. In some cases, the SAM will also bring in 3rd industry to deliver a keynote speech. The QBR also help update the KPI and measurement dashboards for both executive leadership groups.

**Why?**

Ultimately, the SAM has the answer the question each day with the client, “why our company?”. Vendors spends hours trying to displace competitors in key accounts. They use method including dropping costs, free products, sponsoring an industry white paper, or even take advantage of incoming new executives. The SAM, on a daily basis needs to keep champion the phase “Why US?”. The ability for the client to agree with your “Why” along with your measurement KPI’s, gives the SAM a benchmark to report back his/her leadership.