

REVIEW REGRETS

STEVE HOYLE highlights some typical review meeting mistakes made by account managers

The review meeting is fraught with danger for all concerned. Most salespeople approach the review of an account, opportunity or territory with a mixture of anticipation and dread: anticipation that they can both impress the boss and others as well as get ideas and buy-in to their plans; dread in that everything may get shot down in flames.

Some review sessions, of course, are not a review at all. There are many examples where 'bid reviews' are simply an opportunity for everyone who is not involved in persuading the customer to place an order, to tell the account team that they are selling things that cannot possibly be delivered at prices that are almost giving the shop away. The sales team will react to these sessions, having their belief reinforced that everyone else is divorced from the reality of today's market and customer demands, and should start producing things that customers actually want, and paring down their costs to make them competitive.

But there are many reviews that are genuinely arranged with the purpose of helping the account team and increasing the chances of success. There is often a lot of work that goes into these sessions in advance, and account managers as well as sales managers and others will be very familiar with the account/opportunity/territory planning tools. In the vast majority of cases, however, while the plans themselves may have been well thought through, there may have been little preparation, little training and little thought about the review meeting itself, leading to some common problems.

Here are some common review meeting mistakes made by account managers:

NO CLEAR PURPOSE

Probably the single biggest mistake that we observe is the salesperson not being clear on their aims for the session, and not stating them up front. In the worst cases the default aim of the account manager is to simply 'survive' the review.

There could be several different reasons for the sales person and the account team reviewing their plan including:

- Getting commitment to some resources
- Getting commitment to some actions
- Getting guidance on company policy for certain aspects of the plan
- Getting feedback from a fresh pair of eyes

- Simply communicating the plan so that everyone is clear on the direction and their roles.

NOT UNDERSTANDING THE REVIEWERS' PURPOSE

The second biggest issue for most review sessions is not asking the reviewers what they want to get out of the session, leading to confusion, friction and, at best, some missed opportunities.

Just as the account manager has choice about the purpose of the review, so does the sales manager and others who may be reviewing. Ideally they will have made their objectives clear before the review itself, but the account manager should always ensure that they are explicitly brought out at the start of the session to avoid any confusion later on.

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MANAGEMENT OF TIME

A common issue is failure to manage time in the session properly, in particular presenting for too long and not having enough time for answering questions or discussion – and then not being able to meet objectives.

NOW AND THE FUTURE

A sign that the account manager and the account team have not really produced a real plan is that they spend far too much time on history and detail of where they are today, rather than focusing on future actions. In an account or an opportunity plan the understanding of the current situation is critical, but only as a foundation for deciding on the best future strategy and tactics.

BASIC MEETING MANAGEMENT

Knowing who the audience are, how long they have and managing questions is crucial. It is unclear why salespeople who are great at handling customer meetings sometimes fall down internally.

BULLSHIT

In the often highly pressured situation of a business review with your boss, peers and others it is sometimes too easy when asked a difficult question, or when the conversation turns to a particularly complex area, for the account manager to respond with what consultants may call 'verbal imprecision', or most of us call bullshit. You will get found out, sometimes straightaway and sometimes later. The sales manager may appear to let you get away with it, but will very likely store it away for future reference.

The golden rule is very clear: if you don't know



something, don't make it up, or tell a white lie, or prevaricate. Own up to it and, if necessary, commit to find out within a reasonable timeframe. Every other approach is both useless from a review perspective, and damaging to your personal credibility and standing. This is a good example of being prepared to have a little bit of pain now, for the sake of your future health.

BEING DEFENSIVE

Any plan is an exercise in giving yourself choice, deciding on what are the best courses of action. In making these choices the professional account manager will have weighed up the pros and cons of different strategies. During the review, it is right that sometimes these choices need to be understood better and challenged; this is all part of healthy debate designed to get the best possible outcome. Unfortunately, some account managers take any request for clarification, or especially a direct challenge as a personal attack and become very defensive. Sales managers and others are only going to react to this in one way - they will not become submissive; they will start to probe deeper, wonder if the salesperson has actually thought things through rationally and the whole conversation is in danger of spiralling downwards. As any plan will have strengths and areas where it is exposed, a good account manager will point the weaknesses out upfront, explain why the proposed course of action has been put forward in the plan, and then welcome any vigorous debate as a way of proving the plan or refining it to be even better.

NOT BEING BOLD ENOUGH

This is often a conclusion when considering the content of an opportunity or account plan, but is also true of the review session itself. Imagine what you could do with the

assembled brainpower, experience and authority levels in the room: you could ask them for their opinions or advice on particular topics; you could ask them to rate or rank your efforts against others; you could ask them to commit to significant levels of resource; you could ask them to 'think the unthinkable' and look at what else you could be doing; you could ask them how they think your competitors would react to your plans. The possibilities are endless, but many account managers simply present a standard plan template and then look for the review team to lead the discussion.

NO STRONG CLOSE

As above, having presented a standard template, many salespeople simply ask for "any questions". If there is time they will get quizzed about the plan and the conversation eventually runs out of steam or times out. Really good account managers manage the whole process, probably by allowing the conversation to freewheel for a while so that the reviewers can delve into their own particular topics of interest, but then, with a few minutes to go, the account manager will start summarising the conversation, summarising the commitments that they are looking for and close on these, and then finally summarise the entire review to give everyone a strong sense of what has been achieved, what has been agreed and next steps.

In the September/October edition of *Winning Edge* we'll take a look at the common mistakes made by sales managers when it comes to review meetings.

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