

# Who's behind the mask?

**STEVE HOYLE** explains how a better understanding of the different types of 'account manager' will help you define the role for your own organisation

**T**he term 'account manager' is one of the most overused in selling today — so many people with that title do nothing of the sort. Analyse the words themselves — 'account' is fairly self-explanatory and means that someone is in some way aligned with a particular customer. 'Manager' on the other hand is more nebulous. One of the classic definitions is that a manager plans, organises, leads and controls an activity. Most 'manager' definitions containing at least two of these words.

Analyse further what account managers actually do and you come across a wide range of activities, and a wide range of skill levels. At one extreme may be a very junior person with little or no training sitting in a call centre and responding to requests for information, while at the other you may have a very experienced and expensive professional, working at senior levels within their customer organisation. They could well be developing and then closing substantial contracts for both parties.

Our research into account management has led us to identify three very distinct types of activity, which can help in determining the optimal selling model. For salespeople and sales managers, understanding that there are three different aspects to the account manager role should help develop your skills and your approach so as to maximise your performance.

First, *account servicing* is defined as that very valuable and necessary function of being the focal point for the customer for any sales-related issues. It can be totally reactive, simply responding to customer requests for information, pricing, and so on, or it can be proactive,

perhaps by regularly communicating with the customer to see if they are considering a purchase.

Account servicing is an activity that offers great scope for automation, it can be undertaken by less expensive staff, and it can educate the customer to buy in ways that are more efficient for them and for you. It normally happens in real-time and involves multiple short interactions with lower level, often technical or procurement people.

Second, *account management* is defined as working with the customer to look at their medium and longer-term requirements as they are currently understood. Typically it will involve discussions with technical or functional heads about planned projects, so for example, a salesperson selling IT would talk to the IT director about planned IT projects over the next 12 months or so. It allows the salespeople to start positioning themselves to best advantage, building relationships with key decision makers and influencers as well as trying to shape buying criteria to favour their solutions.

An essentially proactive activity, account management differs from mere account servicing. You are not only asking the questions about



◀ future projects but you are acting upon the answers to put yourself in a stronger competitive position. It is almost impossible to carry out real account management without some form of account plan, setting out your planned future goals, objectives, strategies and tactics.

Finally, and probably the activity that sets the really smart salespeople apart from the rest is *account development*. Good account management involves discussions with senior functional managers about planned future projects, but account development is defined as actually going out into the business and generating or at least shaping future demand. So while the salesperson selling IT is talking to the IT director about future requirements, the account developer is talking to company heads about the whole business, planting seeds and developing demand. This could eventually end up as requirements that the IT director has to fulfil and clearly the best account developers will do this with the willing cooperation and support of functional leaders such as the IT director.

By examining these three very different activities — account servicing, management and development — sales leaders can start to refine their selling models. They will be much more efficient and effective by getting the right blend of people and processes to handle the

*Account development is defined as actually generating or at least shaping future demand'*

may want to plan out known deployments of your solution, or to use your sales team as a source of ideas and knowledge.

Understanding these different aspects to account management should help you plan your time by having better insight into the importance and urgency of activities, while also perhaps pointing to areas where you either need help or personal development so that you can cover all three angles effectively.

For example, if you are not particularly responsive to customer requests, then perhaps you need to either set blocks of time aside at certain parts of the day, or get agreement for a more junior person to help you, or educate your customer to be more self-reliant, or probably a combination of all. Or if you do a good job of servicing and managing your accounts, but do not engage in much real account development activity, then perhaps you should be involving managers or marketing people more in your accounts, or ensuring you contact customers at times when it is not critical (ie. not when they have some emergency issue or at the end of the month/quarter).

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## CASE STUDY

# A TYPICAL DAY

### SAM, THE ACCOUNT SERVICER

Sam is an experienced telephony systems account manager mostly involved in servicing accounts. Today her morning is spent in the office dealing with numerous requests for quotations from her customers, as well as a variety of service and billing issues.

Sam is fortunate — she has been doing this job for a while and her company has trained her well, not only in the products and services that she sells, but also with her interpersonal skills. The latter were always good but they've now been honed to produce much better business results.

Sam has an early lunch with a few colleagues, catching

## CASE STUDY

### MIKE, THE ACCOUNT MANAGER

Mike is an experienced account manager involved in the real management of accounts. His company sells outsourced catering and vending services to clients in the professional services sector.

The day starts with a call on an existing client, a large firm of management consultants, where Mike's company provides a complete self-service restaurant facility as well as meeting room refreshments. Mike meets with the facilities manager and operations director to discuss a new office location that they have just acquired and where they are going to house a customer training and development facility.

Mike knows the customer quite well and persuades them to agree to a number of requirements that he

## CASE STUDY

### DANNI, THE ACCOUNT DEVELOPER

Danni is an experienced account manager and is mostly involved in developing accounts. She works for an IT and communications systems integration company and has a small number of large accounts to manage, all in the finance sector.

Danni starts work early at home attending a webinar with some finance sector consultants who are covering general trends in the sector and particularly the changing demands of regulation and customer expectations on the major

insurance companies. Danni asks a number of questions that are particularly relevant to the three insurance companies that she manages, and makes notes to raise these issues at a roundtable dinner she's arranged for later in the week.

Next it's a conference call with an existing account where she is working with the CIO on a campaign to

up on the latest company issues and some new product promotions, before heading off for the afternoon to see three customers. Her main contact at her first customer is the purchasing manager – he knows her well, really appreciates her attention to detail and so is very happy to keep placing business with her.

Sam's next call is another longstanding customer, where she discusses with the telecommunications manager his plans for the next six months and they draw up a list of likely requirements for items such as new equipment and software licences.

Her final call of the day is a new prospect and this is the

first time that she has met a consultant who is advising them on choice of a new system. Sam completed a request for quotation (RFQ) a week ago, and this meeting is to handle a few questions that remain. Sam knows that responding to RFQs and tenders is a bit of a lottery, but she won some good business last year and today's is worth a lot of money if she could close it.

Sam manages to finish all three calls in good time, and heads back to the office to finish off a couple of quotes she's promised to customers. It has been a busy day but she manages to finish just 20 minutes after her official finishing time, so that she can get home in good time.

knows will give him significant advantages when the contract is put out to tender in two months' time (indeed, Mike is also working with the facilities manager to try and engineer the situation so that it does not have to go to competitive tender).

Mike makes a few phone calls on the way to his next meeting. He has a good sales support person who can deal with many of the day-to-day issues that occur, but he likes to be up to date with what is happening with his customers. Today an emergency situation has arisen where the catering manager at one his most important clients has gone off sick. It has been arranged for a replacement to travel to site immediately, but Mike knows that the client has experienced a few problems recently, so calls his major sponsor to put her mind at ease that everything is being

done, and to see if there has been any impact on the client.

Mikes second call of the day is to a prospect where he has been short-listed. Mike meets with other members of his team in a coffee shop close to the prospect and they go through an outline of the presentation to be made to a steering team consisting of the finance director, HR director, office manager and facilities manager. This is a sizeable contract and Mike believes that it will be won by emphasising his company strength in the market, so he will speak mostly about some reference customers and the outstanding levels of customer satisfaction that they have reported.

Mike returns to the office late in the afternoon, for a meeting about a planned series of seminars for customers looking at next generation vending services.

educate business heads about the possibilities of some recent advances in technology and communications. They agree to a series of meetings with business heads, where Danni will put together some 'scenarios of the future', depicting how each particular business can benefit from implementing new tablet technology and advanced communication solutions.

Danni calls her internal account manager, who takes total responsibility for all day-to-day activities by providing what they call a 'buying service' to Danni's customers. She then works on a discussion document for another customer that explores three different future scenarios for how technology could impact their business.

Danni drives to a lunchtime appointment with the head of marketing at one of her major clients. They'd met at a seminar a few weeks previously and this meeting was to progress a project that they had discussed. Danni's objective for this meeting was to gain agreement for a joint project

that would provide the business case for a major new application. At the two-hour meeting Danni is introduced to one of the marketing managers who has been given this as a personal project to own.

Finally Danni goes to her office for a meeting with her sales manager. She is considering making a big change to the account plan for one of her major clients. Up to this point she has been working with two of the key divisions and has had good success, however the opportunities throughout the group are huge, so she wants to start working much more closely with the central IT group. But there is a risk to making such a change – a number of the personalities involved are engaged in political manoeuvrings that Danni only just about understands. She needs to brainstorm the situation before making any decisions and weigh up the risks and potential rewards with regard to her objectives and strategy.

Danni worked well into the night the previous two evenings, but today she manages to get home as usual.