ClarityES1 Podcast Episode 4: Giving SAMs the technology they *really* need.

Welcome back to the ClarityES1 podcast series. I'm your host, Chris Deren and after a couple of decades of helping field teams develop into their full potential, I can say that we've learned a lot, especially about Strategic Account Management and how to get it right.

And as much progress has been made in Strategic Account Management initiatives, Training and Development, B2B Commercial Organizations are still lagging in one critical area…. The ability to support SAM teams with technology, tools and content that truly reflects the complex world they live in.

Part of the issue seems to be the strategy of taking legacy systems and modifying or stretching them to meet the needs of SAMs. The problem with this is that you're starting with a pre-built canvas of process and functionality that was created for a different purpose; (in most cases, solutions that were designed for sales reps driving more transactional behavior).

As Strategic Account Management has grown more complex, the range of types of customer stakeholders and influencers has also increased. So too has the need for much tighter collaboration around the Key Account from others internally playing a core or extended team role. All of this leads to a specialized set of system requirements, workflows, processes, data, and content that quickly outpace the capability of tactical selling solutions.

It's not that companies don't know this. When older systems are modified and put in front of account management teams, you can hear the groans from miles away and adoption efforts become futile.

Why then does this continue to be a problem leading SAMs to take matters into their own hands and store account plans in excel spreadsheets, word docs, PowerPoint files or other non-database driven places that makes account and opportunity pipeline visibility for leadership challenging and creates scenarios where account plans walk out the door if somebody leaves?

Well…. Here's a few thoughts and opinions from my time in the trenches with SAM teams in multiple industries….

First, if ever there was a time to build from the outside in instead of the inside out, this is it. What I mean by that is that there's as much art as there is science in Strategic Account Management and one size doesn't fit all. If you start with the end state: A set of customer stakeholders who see truly differentiated relationship value in the way the SAM team engages them and has deeper levels of insights around their expectations, challenges, needs and opportunities and then look at what the SAM team needs to do to proactively align during these interactions, you will generate a set of strategies, actions, workflows, processes, data, content and reporting requirements that can and should be mapped into the right solution. Be prepared that it may end up looking quite a bit different than a legacy system built for others. And while we’re on the topic of one size doesn’t fit all, solutions with the best adoption curve are those that are tailored **both** by industry **and** role.

Another issue I’m seeing recently is the almost obsessive focus on data and AI in selling environments. Now… I may be a bit old school, so bear with me here. If we use B2C scenarios or even B2B ones where a sales rep is engaged in a high volume of low complexity, short cycle sales opportunities and you layer in data and AI solutions that make it possible to better predict where they should spend the bulk of their time in territory and where their next wins are likely to come from, I totally get it; even to the point of saying that tech solutions for these folks that don’t have a strong data and AI component are incomplete.

It's in the application of big data and AI specific to Strategic Account Management where I’m hitting a mental pause button; especially if the focus on it is distracting organizations from coming up with the core, tailored functionality that SAMs really need.

Of course, within the same major or Key Account that a SAM owns and where they are working to build long-term relationships with more senior stakeholders, one would expect to find others in the sales organization driving day-to-day transactional activity that legacy systems can support just fine, and now more modern versions of the same systems include data and AI components that lead to the predictive behavior insights previously mentioned.

But if you sit with a SAM in pharmaceuticals calling on a Chief Medical Officer or a relationship manager in financial services calling on the Head of Finance for a large multi-national, the whole data and AI discussion will quickly be regulated to just one component of a larger strategy that includes levels of due diligence, opportunity prioritization, stakeholder mapping and account team collaboration that render big data and AI much less helpful. Sometimes, there's just no amount of data crunching that will tell you what the CTO is going to do next or what the VP of Operations thinks of your company and their motivation to partner with you.

Often there's no substitution for the well-designed strategic account plan and the well-orchestrated set of initiatives and actions across the team that lead to long-term success with a key account and the right tech solution for SAMs should directly support this.

Now if you're listening to this podcast as a leader in a SAM organization, I'm guessing that I'm bringing up a few points of frustration but you're otherwise tracking with me on this.

If you're leading an IT/CRM group and you're being asked to come up with solutions for Strategic Account Managers in your particular industry, this might be frustrating for other reasons. But it's my contention that it doesn't have to be this way, at least not anymore.

The technology platforms available today that fall into the "low-code" or "no-code" categories, not to mention some that are now pre-tailored by industry and role make it possible to deliver solutions for SAMs in a fraction of the time and at a fraction of the cost. Templates can now be modified, workflows configured, processes tailored, and content tagged by industry and role in a matter of weeks, not months or longer.

So yes, I'm suggesting that the days of re-tooling systems built for other purposes as a way to satisfy SAM requirements are over. The good news here is that there are faster, less expensive options to give SAMs the technology the ***really*** need.

Thanks for listening to the ClarityES1 podcast series. Until next time….