



ClarityES1 podcast #5: Don't stop at the "WHAT" and "WHEN" with SAMs.

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.

So much of what organizations seek insights and advice on when implementing SAM programs is forward looking and well-intentioned. But there's often a fundamental missing link and it results in initiatives that stop short of giving SAMs what they need to **act** on best practices and account-based strategies more effectively.

It has to do with the **WHAT** and **WHEN** of SAM (which most SAM programs, training, and coaching offer in abundance), versus the **HOW** and **WHY** of SAM and that's the part that's usually missing.

Let's unpack this a bit and explain what we mean because we believe it's holding SAM teams back from realizing their full potential and translating a company's goals for and with Key Accounts into the actions and outcomes desired.

For years, Key or Strategic Account Training and Development programs have focused primarily on the **WHAT TO DO**, sometimes called next best actions, points of process defined by stages or

steps, milestones, and the like. Most of these initiatives also incorporate the **WHEN TO DO IT** or the natural order of taking these actions that's recommended as part of the overall flow or process.

So far, so good.

Here's where the problem comes in.

If the guidance, training, coaching and recommendations inherent in these programs stops there and don't continue on to explain the **WHY** and the **HOW**, not just the what and when, SAMs will assume they need to figure those parts out on their own, often through trial and error, and it can result many times in hesitancy to take next steps and a lack of progress in the account.

Let's illustrate how this scenario plays out. A senior Sales Rep has risen through the ranks and was promoted into a SAM role calling on a set of Strategic Accounts. They participated in a KAM or SAM Training program that offered in-depth direction and insights on building out account plans, prioritizing opportunities, researching decision makers, and creating differentiated value for and with customer stakeholders.

From there, account plans, strategies and next steps are reviewed, and work begins. And let's say gaining access to a VP-level or C-level executive is part of the mix of expectations between this SAM and his or her manager. So, they walk away from the account planning conversation

knowing that they need to access the senior decision maker and the time frame they're expected to do it within. (in other words, the **WHAT** and the **WHEN**).

But if the **WHY** is never communicated.... The background thinking and context behind **WHY** the organization sees it as imperative that this senior executive is engaged, then the SAM is pushing forward without understanding the purpose of the engagement and how it fits into the overall game plan for the account. Is it that leadership just "feels better" about a forecasted opportunity if a senior-level stakeholder is involved? That may be great for them, but it's not yet likely to produce a compelling reason for that senior executive to meet with the SAM in the first place.

What's fundamentally more concerning is the lack of details and direction around the **HOW**. Setting the expectation that the SAM needs to meet with the CTO, CMO, CFO or another C-suite executive is one thing. Having them walk into the account with the information, preparation, and confidence to know **HOW** to access them, not just once, but on a repeat basis, is another thing altogether. And let's face it... How many SAMs are going to speak up and admit to sales leadership that they don't know **HOW** to do it?

A similar scenario can be seen when a SAM needs to marshal internal resources on the account's behalf by coordinating core and extended teams including those that do not report to them directly and may have other competing priorities for their time. In these cases, they not

only need to understand the WHY and HOW themselves but need to communicate the same if they're going to get the cooperation, they need at the account level.

Now, I know there are those "seasoned" SAMs out there who over the years have figured out the WHY and HOW mostly on their own. I'm not talk about those folks although they too have witnessed account environments where the pace of rapid change and increased complexity no longer guarantees that what worked in the past will work now and the WHY and HOW will be easy to figure out.

I'm talking about the legions of SAMs who are still struggling to see the **WHY** and have confidence in the **HOW** and I'm suggesting that they should no longer be left on their own to work through this.

Yes, rapid changes and rising complexity have made Strategic Account Management more challenging overall. But advances in technology, digital due diligence, training and coaching tools and information sharing have also generated many new options for organizations to identify the frameworks, best practices, account-based content, and other components of filling in the WHY and HOW for SAMs.

And within any mid-to-large commercial organization these days, there are far more effective and faster ways to disseminate what the most tenured SAMs know about the WHY and HOW to others coming up through the SAM development continuum.

So having SAMs follow a process where there's a set of checklist steps for the Strategic Account that communicate the "did you do this?" And "when are you going to do that?" Is what needs to be examined because in absence of explaining the **WHY** and especially the **HOW**, SAMs are entering the Key Account environment in an unnecessarily compromised position. Conversely, SAM teams that are fully equipped with the WHAT, WHEN, WHY and how of Strategic Account Management are far more likely to succeed in the short-term.

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