

KAM ACADEMY

KEY ACCOUNT FOUNDATIONS SERIES

MODULE 2

**THE FIVE TRAITS OF HIGHLY SUCCESSFUL
ACCOUNT MANAGERS**

Foundations Series - Module 2

The five traits of highly successful account managers

Introduction to the Academy and this Module

- Module Introduction
- Learning complex skills
- Learning the skills of account management
- Module Objectives & Output Expected

Self-reflection & Self coaching

- Progress checklist – Top Manager criteria
- Progress checklist – current state issues
- My Results so far
- Self-coaching sheet

Self study units

- Unit 1 – Be objective and use measures
- Unit 2 – Know what is happening and what it means
- Unit 3 – Seek opportunities from change
- Unit 4 – Take responsibility to drive the business
- Unit 5 – Influence without authority
- Definition of key account management
- Moving from selling to account management
- Matching the effort to the opportunity
- My Thinking sheets

Group seminar – individual preparation

- Additional points and your questions
- Group seminar preparation checklist

Group seminar – agenda and action

- Session agenda
- Meeting summary and agreed action

Implementation Plan

- My Action Plan
- Results and learning from my implementation so far

1-1 Personal Coaching

- My coaching questions and points
- GROW Coaching questions

Application of the learning

- Defining growth – thinking exercise
- Defining the trends – thinking exercise
- Defining why we win – thinking exercise
- Application of the learning – thinking sheet
- My Action Plan

Foundations - Module 2

Self study units – the five core traits of success

Unit 1 – the importance of objectivity and measurement

Unit 2 – the challenge of turning knowledge into insight and action

Unit 3 – the need to seek and embrace change

Unit 4 - need to drive the business – not be driven by the business

Unit 5 – the ability to influence without authority

Application of the learning

how should I apply this knowledge? what exactly is my plan?

Group seminar

rank the KAM skills and knowledge for your situation - exercise

review the traits and examples - discussion

revise your plan – identify your priority development topics

Live implementation

implement your plan with the real customers

Coaching

review – what success- what changes to make? revise the plan

MODULE 2

THE FIVE TRAITS OF HIGHLY SUCCESSFUL ACCOUNT MANAGERS

Introduction to the Module

Module Introduction



The material for the Key Account Academy has been developed and **tested over many years** by hundreds of account managers around the world. One of the benefits of this experience is that we have been able to observe the 20% of so of high performing account managers and consider **why these individuals achieve so much more than the average account manager**.

Our conclusion is twofold.

Firstly there is a **set of complex skills which makes up the skills of account management** – the highly successful managers are more knowledgeable and more competent at using these skills and the good news is that all these skills can be taught. Most of these skills are taught as part of the Key Account Academy.

Secondly, the **highly successful account managers have a different attitude to the business**. Attitude is a much more personal thing and it is not so easy to teach. However, what we can do is identify the attitude and approach which we observe more often in highly successful account managers and we can discuss this together. Then you can compare your own attitude and approach with the highly successful model and consider changes.

You can also **use the attitude and approach traits to check that you are on the right track** and perhaps when things have not gone quite so well you can refer back to these traits to consider what you could have done differently. So this is not a test but rather a good way of being objective with yourself.



Learning complex skills



Account management is not a skill – **it is a combination of many skills**. Highly successful account managers must be familiar with and confident to use this range of complex skills.

We all learn different types of skill in the course of our lives. Some skills are simple and require straightforward knowledge transfer. For these skills, as soon as you tell me what to do I will be able to do it because it is simple and obvious – I just have to know. For example learning how to use the basic functions of software tools is knowledge transfer. Once I know that this button performs that action I will be able to press the button and perform the action. I am immediately competent.

Let's contrast this with learning a sport. Being good at a sport does not rely on simple knowledge transfer. Of course **you have to know what to do but then you have to practice – the more you practice the better you become**. You must work out how to adapt your use of the skills to meet different circumstances and also how to use your own individual strengths to enhance your performance. For example you may be naturally faster than me but I may have more endurance; so you might do better than me at the start but as the game goes on I might start to outplay you.

Learning to play an instrument is a similar situation and of course no one would ever think that sitting in a hotel room for two days learning about piano playing would make you a highly competent piano player – **it is something which requires content development and practice**.



Learning the skills of account management



The skills of account management are similar to our sports and musical instrument analogies.

Account management is a complex mix of skills which **require a great deal of thinking, practice and experience to become highly competent.**

Now we can see why a two-day training seminar will never be sufficient to develop highly you as a highly successful account manager. It may introduce a few ideas but it can never cover the range and you have no real opportunity to practice and most importantly review with a coach. **Practice and review with a coach are fundamental to learning a complex skill** like a sport, learning to play an instrument and account management.

In the self-study part of the Module, we will discuss the five traits which summarise the attitude we typically observe in the more successful account managers. You can then consider your own approach.

Then in the Group Discussion part of the Module, we will ask you to consider a range of knowledge skills and traits to help think more deeply about what is likely to most important for you as an account manager in your own environment.



Module Objectives & Expected Output for High Performers

Core Learning Objectives

1. To explain each of the five traits of High Performance

Top Performer Account Manager Criteria - required

this is what we expect a top performer to have or be actively working towards
to be considered a top performer you should be able to demonstrate that you have these things or have activity plans
to show what you are doing and when you expect to have them

1. I can explain each of these five traits
2. I can discuss with examples how I believe I perform in each of these five traits
3. I can show and discuss my Action Plan to develop these traits further



MODULE 2

THE FIVE TRAITS OF HIGHLY SUCCESSFUL ACCOUNT MANAGERS

Self study units

Unit 1 – the importance of objectivity and measurement



Watch Unit 1 *The importance of objectivity and measurement*. Then spend a few minutes summarising the most interesting and important issues for you – this might include questions, ideas and thoughts and so on

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Unit 1 – the importance of objectivity and measurement

Use this sheet at the group session



Now just take a few minutes on your own to think about these ideas. The purpose here is not to test your ability but to give you a bit of time to think about these issues so that you will be ready to discuss them with your colleagues in the Group session.

Can you describe an example when you or someone benefited by being more objective?

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Select one Key Account - do you have a good relationship with the customer? How do you know?

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How could you measure the quality of your key account relationship?

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Note – we shall consider measurement in much more detail in the Strategic Growth Planning Series

Unit 2 – turning knowledge into insight and action



Watch Unit 2 *The challenge of turning knowledge into insight and action*. Then spend a few minutes summarising the most interesting and important issues for you – this might include questions, ideas and thoughts and so on

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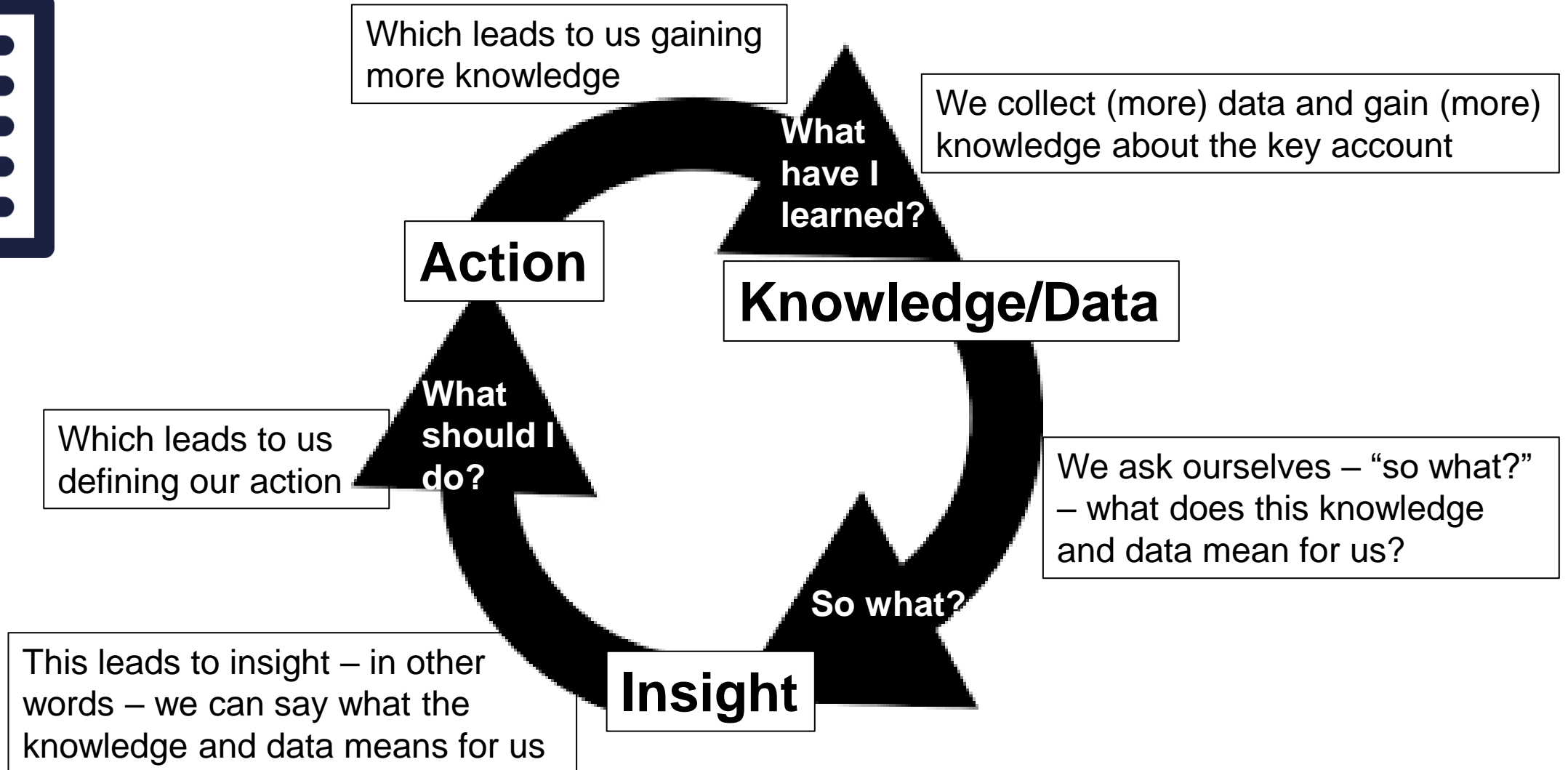
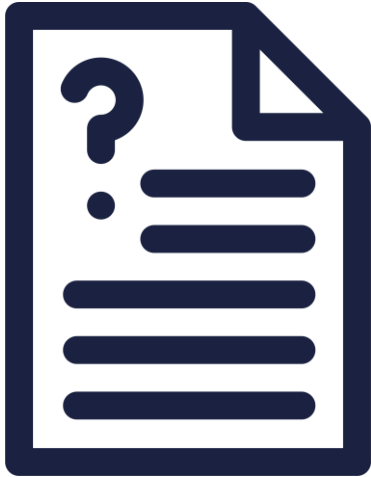
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Unit 2 – turning knowledge into insight and action

The virtuous circle of knowledge and insight acquisition leading to action



Unit 2 – turning knowledge into insight and action

Use this sheet at the group session



Now just take a few minutes on your own to think about these ideas. The purpose here is not to test your ability but to give you a bit of time to think about these issues so that you will be ready to discuss them with your colleagues in the Group session.

What else should you know about the key account?

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Consider one important thing you know – what does this mean to you?

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What should you do?

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Note – we shall consider customer knowledge in detail later in the Customer Knowledge series

Unit 3 – the need to seek and embrace change



Watch Unit 3 *The need to seek and embrace change*. Then spend a few minutes summarising the most interesting and important issues for you – this might include questions, ideas and thoughts and so on

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Unit 3 – the need to seek and embrace change

Use this sheet at the group session



Now just take a few minutes on your own to think about these ideas. The purpose here is not to test your ability but to give you a bit of time to think about these issues so that you will be ready to discuss them with your colleagues in the Group session.

What are the most significant changes in your market or your key account?

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What does this mean for you?

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How open to change are you? What should you change in the next 12 weeks?

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Unit 4 – the need to drive the business – not be driven by the business



Watch Unit 4 *The need to drive the business – not be driven by the business*. Then spend a few minutes summarising the most interesting and important issues for you – this might include questions, ideas and thoughts and so on

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Unit 4 – drive the business – not be driven by the business

Use this sheet at the group session



Now just take a few minutes on your own to think about these ideas. The purpose here is not to test your ability but to give you a bit of time to think about these issues so that you will be ready to discuss them with your colleagues in the Group session.

To what extent can you show you are driving the business?

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What does this mean for you?

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Do you believe that you are responsible for the profitable growth of the key account?

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Unit 5 – the ability to influence without authority



Watch Unit 5 *The ability to influence without authority*. Then spend a few minutes summarising the most interesting and important issues for you – this might include questions, ideas and thoughts and so on

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Unit 5 – the ability to influence without authority



Now just take a few minutes on your own to think about these ideas. The purpose here is not to test your ability but to give you a bit of time to think about these issues so that you will be ready to discuss them with your colleagues in the Group session.

What is your view on influencing without authority?

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What does this mean for you?

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What are the challenges for you?

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MODULE 2

THE FIVE TRAITS OF HIGHLY SUCCESSFUL ACCOUNT MANAGERS

Application of the learning

Application of the learning – summarise the mail points for you



Now think about what you have learned and how you should apply this learning.

Consider – what are the most important points for me? What should I change? What should I do?

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Now write your draft Action Plan

Action Plan - draft

Name

Date

Use this sheet at the group session

Complete your draft planned action resulting from the self-study part of the Module



What I'll do

How I'll do it

Do I have any concerns?

When I'll do it by

1.....
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2.....
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3.....
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4.....
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MODULE 1

THE BIG ISSUES IN KEY ACCOUNT MANAGEMENT AND THEIR IMPLICATIONS

Self Reflection and Self Coaching

Module Progress Checklist – current state – Top Manager Criteria



Top Performer Account Manager Criteria - required

I can explain each of these five traits

I can discuss with examples how I believe I perform in each of these five traits

I can show and discuss my Action Plan to develop these traits further

I have this

I am working on this
and plan to have it by:

I have decided
not to do this

Date



Module Progress Checklist – current state – development



Date

Questions I want to address

- 1.....
- 2.....
- 3.....
- 4.....
- 5.....
- 6.....

Information I need

- 1.....
- 2.....
- 3.....
- 4.....
- 5.....

Anything else

- 1.....
- 2.....
- 3.....

I have this

I am working on this
and plan to have it by:

I have decided
not to do this

	I have this	I am working on this and plan to have it by:	I have decided not to do this
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Self-reflection: Results so far - using this Module I have ...



Summarise the results of your thinking and your work for this Module for yourself so far (this is a good way to track your learning and personal development) – you can add more as you progress

I have:

As at date:

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Self Coaching – personal & private coaching sheet

Self Coaching

Take any current or longer term issue – ask yourself:

What is the issue?:

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What do I want to achieve?

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What are the issues or concerns? What is stopping me?

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What could I do? What are my options?

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Right now, what seems to be the best option for me? What will I do?

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MODULE 2

THE FIVE TRAITS OF HIGHLY SUCCESSFUL ACCOUNT MANAGERS

**Group seminar –
individual preparation**

Preparation for your Group seminar – your questions



What would you like to discuss in the Group meeting?

Do you have any specific questions you would like to the Group to address at the next session? You may want to hear the Group's thoughts on a general question and/or to seek ideas to help you with a specific issue or question.

Note your question(s) here – you can mail out to the Group beforehand or make your request at the start of the meeting

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Preparation for your Group seminar – preparation checklist



Please ensure you have completed the following before the group seminar and have the relevant sheets and results with you for presentation, review and discussion

1. Watched the relevant Unit video(s) and made notes
(decide as a group which units to work on at the next group session)

2. Completed the modules' Thinking sheets to apply the learning

3. Updated your Progress Checklist – both the Current State and Development sheets

4. Completed your Action Plan

I have done this - ready to discuss

I need some help with this or will do it by.....

I have decided not to do this

1

2

3

4



MODULE 2

THE FIVE TRAITS OF HIGHLY SUCCESSFUL ACCOUNT MANAGERS

Group seminar - Agenda

Group seminar – High Performer Traits – Agenda



This is your suggested agenda – feel free to agree changes with the group

You might combine this agenda with that from another module for a longer session or split it into two or more parts for shorter sessions.

Agenda

1. **Confirm the Leader for this session – Confirm/Agree the agenda, content and timing for this session**
2. **Group discussion** – ask each Manager to summarise his/her thoughts on each of the five traits using the prompt questions in Thinking Sheets to start the discussion – make summary notes on the white board/flip chart – summarise the common points and agree implications and action = what/who/when and follow up time
3. **Group exercise – consider skills** – divide into smaller groups of 3 or 4 – ask each sub-group to identify the top 5 skills from the given list of 20 – ask each sub-group to explain their choices – Group question = what does this tell us about Account Management? How did you approach the task as a team? What would you do differently next time?
4. **Individual presentation of My Progress Checklist Current Situation and Development** – ensure everyone is up to date or has a plan to complete – identify any common issues and action to be taken to address and resolve these issues
5. **Individual presentation of My Action Plan** (ask each Manager to summarise his/her Action Plan and ask the rest of the group to comment – does this make sense? Is it clear what will be done and the results? Is it realistic? Can you help?)
6. **Group discussion of any other issues** – (for example – a Manager may want to discuss thoughts or get support for an issue, there may be a new development in the market, new learning to share and so on)
7. **Recommendations for the meeting** – ask the team – was this a successful meeting? Is it clear what action we will take? Should we make any changes for next time?
8. **Next meeting** – agree the date, time, subject and leader – post meeting = leader to send out key points and action summary



Group seminar – group exercise instructions – top skills/traits



This is for the Group seminar – you do not have to do this before you meet

As a team of three or four consider the following list of skills, knowledge and traits of an account manager. From this list select just five which you all agree are the most important and be ready to explain why to your colleagues

Competitive knowledge

Customer knowledge

Driving for results

Having impact without authority

Entrepreneurship

Leading change

Leading the team

Coaching

Dealing with ambiguity

Negotiation skills

Empathy

Project management

Problem solving

Questioning skills

Objection handling skills

Interpersonal skills

Presentation skills

Market knowledge

Product knowledge

Own company and product knowledge

Analytical skills

Able to deal with uncertainty



Group seminar – discussion exercise - review



This is for the Group seminar – you do not have to do this before you meet

Having presented and discussed your lists of five – now as a total team discuss these questions

1. Did we pick the same five or where they different – why?
2. Do you believe it is possible to select only five?
3. What have you learned from this exercise?
4. How did you approach this exercise - what worked well and not so well? How did the team function? What would you do differently next time?



Group seminar – Meeting Summary and Action

This sheet to be completed by the session Leader immediately after the session and sent to all group members



Top five points to remember

- 1.
- 2.
- 3.
- 4.
- 5.

We agreed the following action:

What

Who

By when

- 1.
- 2.
- 3.
- 4.
- 5.

Next group session

When.....Where.....

Subject.....Leader.....

Any additional preparation or work to be done.....



MODULE 2

THE FIVE TRAITS OF HIGHLY SUCCESSFUL ACCOUNT MANAGERS

Implementation plan

Action Plan - Revised

Name

Date

Complete/revise your implementation action plan – then email it to your Coach



What I'll do

How I'll do it

Do I have any concerns?

When I'll do it by

1.
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Now email this to your Coach and review progress at your next coaching session



MODULE 2

THE FIVE TRAITS OF HIGHLY SUCCESSFUL ACCOUNT MANAGERS

Coaching preparation and questions

Your Coaching session – prepare your summary

Personal Coaching



Before your Coaching session, it is useful to summarise your thoughts about this Module. What are the most important points for you? What would you like to do as a result? How could you do this?

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Prompt questions for the Coaching session

Personal Coaching



Here are a series of prompt questions to support your thinking

Don't forget that we shall work on all of these issues in more depth in later Modules - **right now we just want to raise awareness.** So don't worry if you don't have definitive answers – we just want you to think about the issues, identify the challenges and have a first thought about solutions.

What do think about the five traits of highly successful account managers? What is most important here for you?

How could you measure the strength of the relationship with your key account?

Do you think you are prepared to embrace change?

What changes do you anticipate in your market /key account and what does this mean for you?

What would you like to do over the next 12 weeks? How will you do this?



GROW prompt for your Coaching session

Personal Coaching



Some Managers find it useful to prepare for their coaching using the GROW sections – if so here is a template to help you structure your initial thoughts – remember though that the coaching session is designed to help you develop this initial thinking so you should expect to change your views – you don't need to defend these initial ideas.

What do you want to achieve?

What is happening right now? What might happen soon?

What could you do?

Right now, what seems to be the best option for you?



MODULE 2

THE FIVE TRAITS OF HIGHLY SUCCESSFUL ACCOUNT MANAGERS

Recommendations

Module development and improvement



We aim to improve the modules on a continual basis using feedback from you.

If you have thoughts and ideas about how this module content or process could be improved please complete the sheet and send it to us. We review each module formally every quarter and we will welcome your input.

This module would be even better if...

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Send to info@KeyAccountAcademy.org using "Module improvements from Your Name" as the email title



LOOKING FORWARD...

**The next Module in the Foundations Series
looks at how we should measure success in
Account Management**