

Strategic account team coaching: How a SAM can optimize the team's effectiveness

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When contemplating coaching by a strategic account manager, we immediately generate controversy. Should a SAM also be a team coach? Do team members want or expect a coach? Is the SAM qualified to coach? Is the SAM empowered to coach? Does a SAM want and / or expect to be a coach?

These are significant questions for any organization. Now let's add to this puzzle some recognized and accepted facts. 1) Accounts are often best serviced by a collaborative team approach. 2) An account team is made up of individuals who need to be unified as a team. 3) The power of any unified team is always greater than the power of "I." 4) Customers expect a unified supplier effort. 5) Most, if not all, people need leadership and continuous development.

Consider further:

- All teams need direction and to be led;
- Most, if not all, people need to be coached;
- Any group of individuals placed into a team situation needs to be unified as one team to be most effective and productive;
- Top-performing teams have one thing in common—a winning coach; and
- At the center of our account management practice are strategic account teams.

Based on these facts and the expectations for any strategic account team, it would not only be wise to ensure that a SAM is an effective coach—it should be mandatory. A SAM who is an effective coach will have a higher probability of success. Let's explore how a SAM can become a world-class coach.



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Awareness: The mistakes organizations make

It seems almost unbelievable: A top-performing sales representative becomes a SAM and immediately begins to struggle to obtain the same level of extraordinary performance from his team that he obtained on his own. This situation is very similar to another one of the most common mistakes many companies make. They often promote a top-achieving sales

representative to a sales manager position. The sales representative right away becomes an ineffective sales manager. Why?

Dissimilarities in each of these two promotion situations

The SAM and sales manager roles are significantly different than the role and expectations of a sales representative. Significant data supports that there is no direct correlation between being a top performer (such as a salesperson, athlete or musician) and being a top-performing and effective coach.

Figure 1. Selecting / evaluating possible team members (scale 1 – 5; 5 highest)

Team member options – who?	Do they know the account?	Align to needs / expectations of account / prospect	Available by choice; willingness to be accountable & responsible	Business acumen	Necessary level of product / solution expertise, including negotiations	Makes sense for them; positive career move	Influence, creativity and problem-solving	* Total rating
1. John <i>(example ratings)</i>	4	5	4	5	3	4	2	27
2.								
3.								
4.								
5.								

*Note: The highest total rating should not be considered as the sole selection criterion. In many situations a particular skill set or expertise is more important to the team than all others combined.

While the experience surely helps, there are other equally important traits.

The first and often most significant difference is that success is no longer the result of an individual heroic effort; results are now the output of a well-orchestrated and motivated team working together in harmony, focused on common goals and outcomes.

The following coaching content is intended to create thoughts and ideas on how to be a more effective SAM by also being the team coach. In addition, the intention is to open new horizons of opportunity for a SAM who commits to and executes on this role.

What makes some coaches superior vs. mediocre?

The simplest explanation, while still the exception in most cases, is that some people just end up in the right role—a role that is best suited for them in skills, behaviors, attributes and motivators, i.e., the role of a coach. In other situations people are identified as individuals who may make terrific coaches, and they are placed in the role. In both scenarios, for

coaches on the first day in their new position, the journey has just begun.

There are numerous examples in sports, the arts, business, education and many other situations where some leaders achieve extraordinary results from and through their team. One of the primary differentiators between a superior coach and a mediocre coach is that the superior coach is able to place the team and the

sponsors) and external resources where and when appropriate.

Additionally, there is one critical aspect of coaching that needs acceptance: the idea that “the buck stops here.” Success and failure fall to the accountability and responsibility of the coach, who is chartered to make success happen at the required level of effort and within a defined cost structure. Knowing this from the first

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good of the team members in front of her own priorities. It is no longer “I”; it is all about the team.

Principle 1: The first focus of a SAM needs to be TEAM—living by and for the success of the team and all team members

As a point of clarification, the team is a complex body of members. It is often a cross-functional business unit including sales team members, customers, leadership (up and down the organization, including executive

day in the position sets the bar for his expectations. It now becomes the SAM’s charter to enable the team to succeed.

Principle 2: The first role of a coach is to develop his people

Selecting your team members

One of the most critical first steps for the SAM is to properly select and build her team. To establish a high-performance team, you need achievers who are aligned to and signed up for the mission. Figure 1 illustrates some

Figure 2. Tracking team member performance and contribution

Team member	KPI 1	Rating index	KPI 2	Rating index	KPI 3	Rating index	Average rating index	Target
A	Senior relationships	3	Value proposition	2	Profit	3	2.67	
B	Pricing models	3	Financial analysis	2	Profit	3	2.67	
C	Value tracking	4	Internal business review	2	Profit	3	3.0	
D	Metrics	2	External business review	0	Profit	3	1.67	
Team metric							2.5	4.0

Each key performance indicator is evaluated every six months and rated according to the following scale. (Note: Some KPIs may be annual and should be evaluated accordingly.)

0 – Not completed / unsatisfactory 1 – In process 2 – Completed; needs more effort 3 – Completed; acceptable
 4 – Completed; very good 5 – Completed; extraordinary

- Know the job of coaching, as well as what and who will need to be coached?

Principle 4: To be an effective coach you need to know what effective coaches do

Effective coaches have and are committed to process. Process is best defined as a sequential series of activities that are predictable, repeatable and measurable. When these activities occur in this sequence they often deliver the desired and expected outcome. Often successful coaches are predictable. Why? Because they know their system works.

This leads us to another

important principle that highlights how to almost guarantee that you make the number.

Principle 5: Making numbers is the output from an effective coaching process

Frequently account teams focus on the results vs. the process for attaining results. Results are the output from executing a process effectively. The following is a situation I encountered that really demonstrates how output is a direct result of the ongoing execution of an effective process.

While traveling in the United Kingdom, I found the people’s passion for their gardening very revealing. Regardless of the size or location of the patch of their land, they treated it as a valuable asset that offered many pleasant experiences and outputs. What I came to learn was that gardening in the UK is a process; it was an ongoing (often daily) ritual. There was a vision for the garden, the soil needed to be tended to, selecting the right plants was critical, weeding and feeding were done as appropriate, and there was great celebration (sometimes even bragging) around the output. The flowers and / or vegetables were simply outputs of correctly following the process every day.

important considerations in this selection process.

It is recommended that a SAM adopt this approach. However, he should tailor the criteria to his individual account situation to better align with the team’s needs and priorities. The team then becomes more dynamic and adjustable to the situation and needs at hand. Coaching and benchmarking your team

You have taken the position as a SAM and selected and built your team. But the SAM also needs to track and then measure and coach progress (performance). It is important to understand: Coaches coach based on facts and facts only. Coaching is also a collaborative process. The most effective coaches have their team members discover what needs to happen before obtaining agreement to do it. This is referred to as collaborative coaching, the most effective technique to gain buy-in and results.

Figure 2 presents a suggested table for benchmarking and tracking critical team member performance and expected contribution.

Principle 3: It is OK to be a lifetime team member and not the SAM—being a SAM isn’t for everyone

After reviewing the attributes of an effective coach, you might decide being

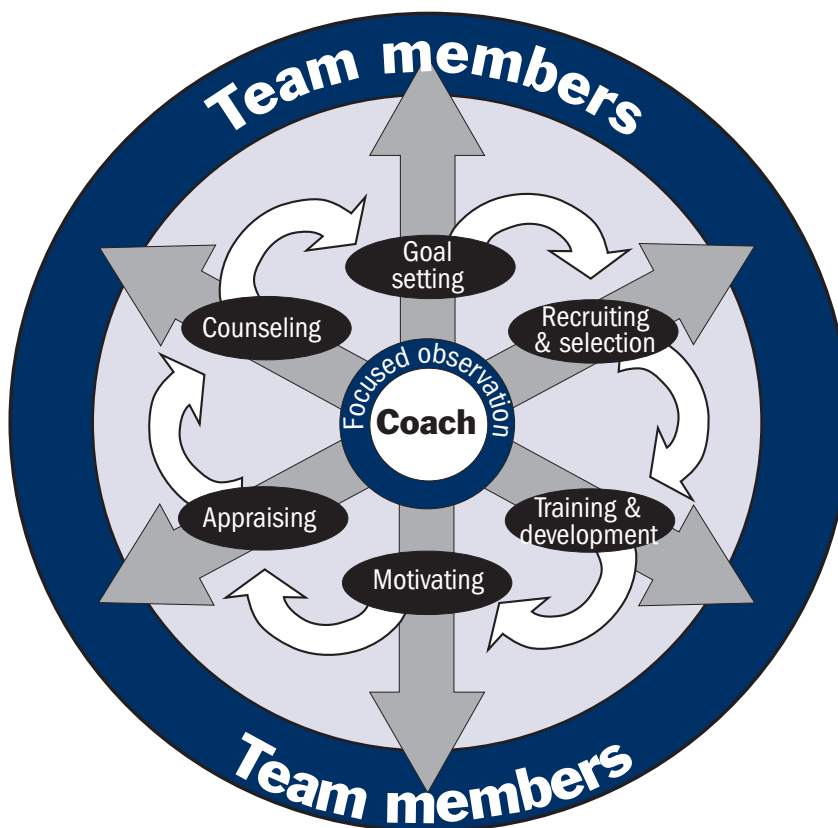
a SAM is not for you. The following may be a good test if you’re considering a career move into the role of a SAM.

Key attributes that enable a SAM to be an effective coach: Do you measure up?

Experience has demonstrated that there are critical traits influencing a coach to be superior (sometimes referred to as a world-class coach) vs. mediocre. Do you:

- Have a passion for helping others to achieve extraordinary results?
- Embrace the success of the team—both internal and external (account) members?
- Commit to investing the time and effort necessary to be an effective coach?
- Receive a great sense of personal satisfaction when others succeed? (The reward is in the success of others, not the money or accolades success may personally bring.)
- Acknowledge and act on your leadership accountabilities and responsibilities?
- Behave in a resourceful and supportive way toward the team and all customers?
- Have the willingness to set the bar high for aggressive yet attainable goals and expectations?

**Figure 3. The Coaching Continuum process:
Seven daily coaching responsibilities of a SAM**



The Coaching Continuum reflects the ongoing coaching activities that are in constant motion to varying degrees of magnitude for the team and specific team members.

Supporting, motivating and leading the team

The seven critical elements (to do's) of the SAM Coaching Continuum are:

- Focused observation: Observing team members in action; leaving the desk for significant field time
- Recruiting and selection: Developing the criteria; identifying and selecting the right team members for the current situation at hand; situations change and so should team members; only select / keep team members who want to be on the team
- Goal setting: Ensuring that the team and all team members have goals; ensuring that these goals are developed through collaboration, understood and agreed to
- Training and development: Recognizing competencies needed by team members and ensuring that appropriate development programs are offered and completed
- Motivating: Providing aligned motivators to each team member, which in turn gives a purpose for all team members to participate and put in extra effort
- Appraising: Monthly, quarterly and semi-annual internal and external business reviews to assess performance (KPIs) against expectations
- Counseling: Taking time to address both positive and not-so-positive situations within the team and taking appropriate actions—counseling can be a positive development action. (Note: In some situations, counseling information may need to be provided to a team member's direct manager for the execution of the manager's counseling session with the team member.)

Specific daily, weekly and monthly activities may vary. However, a SAM should be able to identify how he is executing all elements of the Coaching Continuum on a consistent basis. Each SAM should prioritize and adopt the model as appropriate. The type of team and team members a SAM has can influence where he should emphasize his efforts.

These rituals – ongoing activities performed in a predictable, repeatable and measurable sequence of events – create a process. Over time the process has shown to be very successful, bearing many fruits, vegetables and flowers. Like in gardening, in account management the SAM needs to adopt and follow her coaching process. Making the number in itself can be an overwhelming visual.

What does this process mean to the SAM?

The SAM Coaching Continuum (see Figure 3) is the process for optimizing a team's output. Much like the gardener in the United Kingdom who we previously discussed, when the process is rigorously followed, the desired positive outcome will usually prevail. The most critical word here is "rigorously." It is easy to set a process in motion; it is more difficult to adhere to it on an ongoing basis. This is referred to as commitment.

Principle 6: Commit to the process—hold yourself accountable

The coaching SAM needs to focus on and ensure that the following responsibilities are successfully acted on:

- Collaborative action planning
 - Internal and external business planning
- Priority management
 - Ensuring that key strategic and tactical activities are completed
- Measurements and metrics
 - Maintaining an updated scorecard on all designated performance indicators, i.e.,
 - * Financial
 - * Account loyalty
 - * Relationship penetration
 - * Team effectiveness
 - * Win / loss predictive analytics

Principle 7: Coaching is a journey that never ends and always pays back more than the investment

The final chapter is your commitment to follow the Coaching Continuum on a

Figure 4. Team member knowledge

Team Members	Relevant personal facts on team member	Top competencies	Competencies to develop	Development plan / timeline	Top motivators	Key issues	Career goals
A							
B							
C							


daily, weekly, monthly or quarterly basis, as appropriate. While your coaching process matures, begin collaborating with and assessing your team. It is important that the team be a part of your coaching plan. Reach agreements on important team and personal development issues and concerns. Make this knowledge part of your coaching "playbook," which contains all critical knowledge about the team and team members. It is acceptable if this book is electronic as long as it is accessible and updated. A sample coaching grid is provided in Figure 4.

Making the transformation: 'I' to 'team'

There is one final critical point that needs further discussion. It is seldom that

any SAM will just wake up one day and be a world-class coach. Therefore, this role must be viewed as a journey with many challenges and successes along the way. The journey starts with you, and it begins with your commitment to be an effective coach.

Another important part of your coaching journey is how you position yourself as the coach. Here's a quote from a former player on why he thought his coach was so effective: "Coach never told me anything; he just helped me realize what I needed to do, why I needed to do it and what I would gain from doing it. He then helped me do it. He was really there when I needed him—it was all about me."

The development process for the SAM to become an effective coach is a transformation to a new way of thinking, operating and succeeding. Have a great, successful and fun journey coaching. Your team, including your customers, will appreciate it and be more successful because of it. 

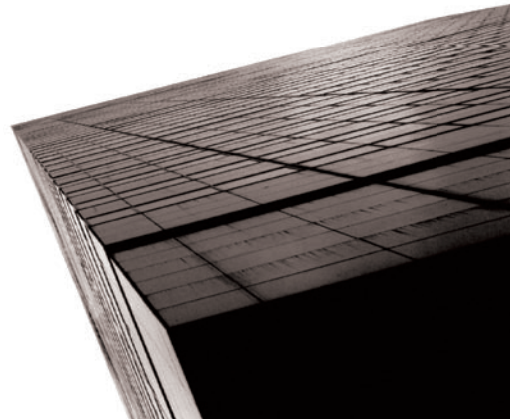
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