The Elements of a Successful Visit - Account Management

The crucial role of account managers

The responsibilities of account managers have changed greatly over the past five years. As the market evolves, innovative sales techniques emerge. Traditional methods are replaced by newer processes, and business roles within the sales organization are freshly defined.

Who's Calling's large dealer group accounts offer opportunities for achieving significant revenue growth. There is a compelling business case for leveraging the value of our existing products and services to create custom programs for our large dealer group clients and prospects. In addition to lowering our internal costs, this approach makes it easier to increase wallet-share and mind-share where it counts the most: at top levels of the nation's largest dealer groups.

This is not to say that at the individual or single rooftop, the same practices shouldn't be applied.

Managing large accounts successfully over time requires different skills than acquiring new accounts. This brief document has been prepared to give you an outline which supports the efforts of an account manager, an integral part of the Who's Calling Team.

Large account management is neither easy nor intuitive

Although the reasons for pursuing large accounts seem relatively obvious, the actual processes required for managing, developing and growing large accounts are often complex and difficult.

Successful handling of large accounts requires inexhaustible supplies of creativity, flexibility and detailed up-to-the-minute knowledge of their account activity and competitive threats.

Superior communication skills are also required. Why? Because account managers are responsible for consistently demonstrating the value of Who's Calling solutions to these clients at the highest levels of their organization. We are face-to-face with top decision makers. They're looking to us for proof that their decision to partner with Who's Calling was the right call.

In today's ultra-competitive environment, making the business case and justifying the value proposition for Who's Calling solutions is an ongoing job.

We must continually demonstrate the value of Who's Calling to the large accounts we handle. At the same time, we must be ready to respond swiftly and effectively to unexpected changes in the market that can be turned into profitable opportunities for Who's Calling.

Remember: We sell to top executives and senior management. For us to succeed, they must see a clear and explicit connection between our contribution and the added value to their organization.

Fundamental goals of account management

1. **Building profitable, long-term business partnerships that deliver measurable benefits for the buying organization and the selling organization.**

Key Elements:

Build Relationship – Relationship – Relationship
Listen
Consult

Genuinely understanding their needs is a way to building a profitable partnership so it's –

Understanding dealer group processes vs. individual rooftop practices
Understanding what the current process is before you suggest something new
Speak with market specific Account Managers regarding their account's current status – do we get to them every 30-45 days?

For an account manager at Who's Calling, selling isn't a hit-and-run affair that ends with a deal. **Selling is a beginning, not an ending**. *It is the start of a long-term relationship based on mutual needs and genuine trust*. From this perspective, account managers have these overarching objectives:

2. **Keep churn to a minimum**
3. **Targeting accounts to up sell**
4. **Genuinely understanding the individual dealer needs**
5. **Building profitable, long-term business partnerships that deliver measurable benefits for the buying organization and the selling organization.**

The key to achieving these objectives is **knowledge**. The more we know about our client's business, the more likely we are to devise solutions that are tailor-made to fit our client's business needs.

The foundation of every successful sales strategy is accurate information. As an account manager, we are uniquely positioned to gather, analyze and respond to information given freely to us by our clients. Listen attentively to what they say, and listen carefully for clues that will enable us to anticipate their needs.

Tactical tips:

1. **Manage regular communication w/key people to maximize partnership.**
2. **Listen for clues to determine pain points.**
3. **Relate those pain points to Who's Calling products.**
4. **Articulate the game plan, first verbally and then in writing.**
5. **Move to the next step, such as a follow-up meeting or draft proposal.**

Our continuing success depends on our ability to foresee the business needs of our clients and respond to them with cost-effective solutions. Staying slightly ahead of the curve is crucial to keeping our clients satisfied and engaged.

Earn the right to be perceived as a partner

Staying ahead of the curve also enables us to identify profit, revenue or cost-cutting opportunities for our client. Our ability to help our client's organization achieve its business goals earns us the right to be perceived as a true business partner.

The goal is to NOT only make the sale with all the promises but actually support the promises and build the relationship/partnership to new levels. This is what makes us the leader in the industry!

Three-tiered process

Our sales strategy for the automotive industry is structured in three tiers. We have a field sales force, account managers and a national account management team. This type of deployment enables Who's Calling to benchmark the sales process at all critical levels and respond quickly to challenges when they arise. This strategy is a key differentiator from our competitors.

- One of our major accounts is Hendrick Automotive, a large auto group with 97 stores around the country.
- A national account manager meets on-site with top executives of the group based in North Carolina and reviews the past month's usage reports.
- This conversation usually generates items for future discussion and highlights emerging pain points. (billing issues, usage issues – certain stores not using WC)
- If the reports indicate that some stores aren't using our products as well as others, the national account manager can pass along that information to the appropriate account manager in that market.
- The account manager can then schedule meetings at the store to work directly with teams or individuals who are having problems with the product.
- Communication is the key – the national account manager is the conduit from the top down and the bottom up.

The national account manager also serves as the primary point of contact for top management at the large account. When issues arise, executives at the account know they can reach out to the national account manager and get a speedy resolution.

As mentioned earlier, the national account manager is first and foremost responsible for demonstrating and communicating the continuing value of Who's Calling products and services to the client VP's on a regular basis.

The account managers in the field meet monthly with the managers of each store. In addition to reviewing reports and dealing with any outstanding issues, the account manager is responsible for gathering useful information that can be passed upwards to the national account manager.

The account manager is often the first person to identify potential opportunities for up-selling, so it is imperative that account managers communicate frequently with national account managers and pass along any new pain points they have observed.

Suggestions passed upwards from account managers often help national account managers develop proposals or pilot programs for large accounts.

If successful, these new solutions can be repackaged and introduced across the group, greatly multiplying their value.

At all levels of the sales process, we must differentiate our products and services from those of our lower-priced and less customer-focused competitors.

Essential tasks of account managers

- Building long-term sustainable relationships with large accounts
- Moving from services vendor to business partner
- Using knowledge and opportunities to capitalize on current market trends
- Decreasing the importance of price sensitivity
- Creating and implementing new solutions
- Demonstrating measurable results and deliver value

- Helping our clients see Who's Calling as absolutely indispensable to their business success.
- Lines of Communication to the region(s) - A consistent message to the team should be a standard process.
- Review activity in the region – Account Manager weekly call, Account Executive weekly call – update current status rooftop level up to the group level.
- **National Account Managers core responsibilities are to work with the regions on strategy, relationship, pricing, group roll out and group communication.**

To recap what I believe is the job description of a National Account Manager

As a National Accounts Manager, my primary responsibility is to maintain a high level of proactive, consultative out-bound client contact to ensure a high level of utilization and satisfaction with WC products and services. It is to build ongoing relationships and favorable contacts with current national accounts (Large Dealer Groups) and resolve customer issues/problems.

The position allows me the opportunity to be onsite when possible to provide a 2nd layer of account management support to the sales team as well as the local account management team. My position supports the western region and the responsibilities' of account support for all large dealer groups as well as providing specialized project setup, introduction and timeline communication for such opportunities to the large dealer VP's.

Duties and Responsibilities:

- Develop and institute customer facing solutions, with WC team to reach or exceed established monthly sales quota through current client up-sells or working with assigned team to complete such up-sell including onsite presentations and support.
- Focus on inbound account retention of customers by resolving challenging customer issues in a timely, accurate and professional manner. Investigate cancellation requests and develop action plans for recovery, management and follow up on all pending LDG cancellations.
- Identifying trends in national accounts through the use of problem solving tools; working with the management team to develop solutions.
- Provide on-going analysis and review of client utilization patterns. Use data to proactively work with existing client base to improve user expertise and effectiveness of Who's Calling products.
- Attend key meetings and represent National Sales team at corporate meetings, conference calls and onsite meetings.
- Responsible for updating and maintaining customer specific reports. (Usage and Billing)
- Use project management tools to monitor each stage of a new project to ensure it is implemented on time and in budget; resolve any difficulties with various managers in other departments.
- Interact with other company personnel, outside vendors and current accounts, to ensure that the project specifications accurately reflect the customer(s) expectations and delivery schedule.
- Complete daily tactical tasks for national accounts.
- Effectively deliver custom presentations as they apply to the client's pain-points and needs and ensure the Who's Calling value proposition is communicated. Ultimately always re-selling the value of any given solution the client currently subscribes to.
- Effectively document and manage sales activities, presentations, client meetings, prospecting, etc. through Salesforce.com for weekly review with team.