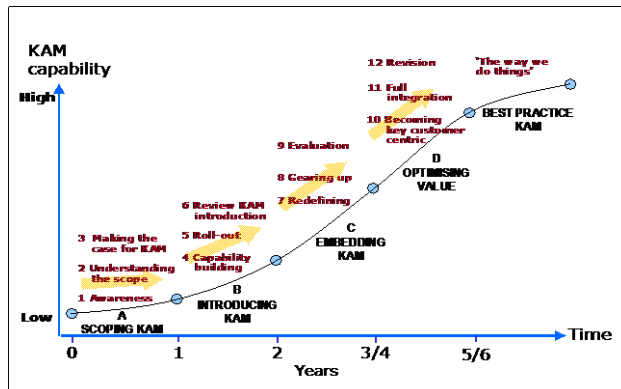


KAM transitioning

Diagnosing progress in against a checklist of KAM programme development actions

Diagnostic tool
For KAM programme
directors, consultants



Any organisation needs to take much the same actions to develop and establish key account management as any other. A 'rough and ready' assessment from internal sources can show far the company has progressed along the KAM transitioning curve, by identifying which essential actions for KAM development have been taken, and to what extent.

Valuable reality check

People who are involved in KAM in your company, either delivering it, supporting it or observing can tell you how far KAM has progressed according to their view of what has and has not been done. You can then see to which of the four identified phases of KAM development the company has reached (at the end of phase D, the company would be operating Best Practice KAM).

- A: Scoping KAM
- B: Launching KAM
- C: Embedding KAM
- D: Optimising KAM

Organisations may think they are in a different position from the one shown by this assessment, and such misconceptions can be very detrimental to further progress. Each phase is implemented through actions that are part of

- Strategy and planning
- Organisation and culture
- Processes.

So you can check whether your company is consistently good or lacking in these areas. This assessment can also be used to:

- demonstrate that more effort and change is required
- highlight perception gaps between different groups of people which can be a barrier to progress
- simply identify what has been done and what has yet to be done, to build an action plan for moving forward.

Background

This checklist offers a quick internal assessment: an external expert should carry out a full audit for an objective view of the current position and specific recommendations for further development.

The research behind this diagnostic tool was published in Woodburn, D. (2006a) 'Transitioning to key account management', Cranfield School of Management Research Report, Cranfield University, based the series of actions which a varied range of companies had taken to develop KAM, or later realised they should have taken. Find out more about transitioning to KAM in Woodburn and McDonald (20011) 'Key Account Management – The definitive guide', (3rd edition), published by Wiley.

Using the tool

Step 1:

Ask appropriate people to complete the questionnaire – more is better, as long as they are involved in KAM in some way: there is no point in collecting the views of people who do not know anything about it. It

Download
Individual transitioning action
progress questionnaire.

generally takes only 10-20 minutes, not long. Use the Individual transitioning action progress questionnaire.

Step 2:

Transfer the scores into the data collector spreadsheet. If you have enough responses, you can check if there are perception gaps by splitting them into groups e.g. key account managers, senior managers/ directors, other functions. Use a separate Transitioning action progress data collector for each of your groups.

Download
Transitioning action progress data collector

Step 3:

Chart the average scores for each sub phase and group. You are unlikely to find an abrupt drop indicating where your company is, because organisations take actions in a different order and maybe quite advanced in one respect while having made little progress in another area.

Download
Transitioning chart blank

For example, this company is still largely in Introducing KAM, where it has completed 50-60% of required action. It has started into Embedding KAM, but has significant actions to take to complete Introducing KAM. It also shows some differences in views between the management team and the key account managers, which should be explored.

