

A day in the life of a key account manager

A case study by Dr Diana Woodburn

It was a crisp autumn morning as Andreas drove his car along the familiar boulevard towards the UNIS offices; and he felt good about the world. He had no client visits booked, his office move had finally taken place, and the problems with his computer seemed to have been fixed at last. Today he would focus on the 'value for money' scheme he had started on his own initiative some time ago, but which had been languishing in the bottom of his brief case for far too long. As he drove, he began to calculate the impact that could be achieved and he grinned gently to himself. "Andreas my man," he said to himself, "Get this right and you'll be going places."

Andreas had joined UNIS from another commercial blind manufacturer 13 years ago, as a technical service engineer. However, he had always enjoyed the customer-facing aspects of this role, so when an opening for a salesperson appeared a couple of years later, he had jumped at the chance. And indeed, the move had proved a good one. He was now a key account manager and, three years into the job, was looking forward to making steady progress in the company. If he could get his ideas for a new approach to 'value for money' developed, he would have a good platform for improving relationships with almost all his customers.

Including himself, there were six key account managers in his company plus another three account managers. The policy was, as far as possible, to divide responsibility for accounts evenly between the managers. Andreas had two key accounts plus six smaller accounts in his portfolio. The others had similar loads, although it was not always clear exactly how many key accounts there were altogether. Recently, there had been a lot of attention on the top 10 customer organisations worldwide, and it was obvious that the CEO wanted the country SBUs (strategic business units) to give them some priority. What the implications were for the rest of the customers was not so apparent.

As he drove into the gloomy shadows of the car park, his attention was distracted by the sight of Maria, a senior customer service executive, driving out. Maria served EDA (one of Andreas's two key accounts), plus a couple of others; and he wondered where she was going. Unfortunately, this ended his plans to talk her about the 'value for money' project; the way in which orders were placed was a significant part of the initiative. Andreas made a note to give Maria a call later to see what she was doing and to fix a date for a chat.

As was his habit, Andreas took the stairs from the car park and strode across the office to his desk. On his way, he spotted Trudi, one of the marketing people, and stopped to see if she had received any design specifications from EDA for a range of new blinds. "Nothing yet" came the cheery response; and then more mischievously "Perhaps they've taken it somewhere else". "Well" replied Andreas, "perhaps *you* could chase them up. I've phoned them twice already and I don't want to become a nuisance." "If I have time," she replied and walked off. It had been over 5 weeks since the EDA marketing department had talked to him about this initiative. They had been very keen and really had nowhere else to go; yet strangely, nothing seemed to be happening. "A bit of a dilemma," he pondered to himself. Trudi, of course, did not report to him and he knew she often found it difficult to judge which tasks to prioritise. It was also quite normal for departments to work to their own agendas.

Turning on his computer, he noted a design update meeting had been rescheduled to later that morning. "Good" he thought to himself, "I don't get to enough of those. It will be a chance to catch up and I can still work on the 'value for money' project either side." His next email revealed an urgent request for some forecast information, for which the deadline was looming. He prided himself on meeting all deadlines so he determined to complete them that afternoon; and then remembered that he needed Maria for some of the information. As he opened up the files to quickly remind himself of how far he had got with collating the data, the phone rang. It was Peter Brun, Operations Manager from WG, one of his long-term smaller accounts. Andreas had known Peter since before he joined UNIS and WG had been his first success when he had converted them to a UNIS customer. Like some in the industry, WG was not blessed with many good technicians and one of the attractions of UNIS had been the depth of its technical knowledge. They were a good customer and as part of his relationship building, Andreas often sorted minor technical problems for them.

An hour later, he put the phone down, and returned to his computer screen to find that it had frozen again. Phoning IT with a polite request to "just sort it" he went to join the design update meeting. As the discussion turned to longer-term business development, he found himself being asked about EDA. Having explained that their strategy was to defend their traditional commercial property markets and that they were looking at opportunities in the market for private residential buildings, the Technical Director asked about the implications for their market positioning. Feeling slightly taken aback, he explained what he knew about EDA's capacity and the data implications, but made it clear that there had been no mention of market positioning difficulties when he had been presented with the idea. Privately, he wondered why a Technical Director should be concerned about market positioning and resolved to pick this up with the relevant Technical Support person and marketing people to ensure he was better informed next time. It was unusual to be challenged in public in this way and he thought the Technical Director had made everyone feel a bit uncomfortable.

His heart lifted as he arrived back at his desk to see his screen active once again. "IT seemed to have done their stuff for once" he reflected. Calculating that there wasn't enough time to start on the 'value for money' project before lunch; he answered another five emails, extracted some information on quality for an account and phoned it through. Leaving for the canteen, he saw one of the other key account managers clutching a pack of sandwiches. "Working lunch?" asked Andreas as he passed. "No, driving! You know how far it is to my largest account and I need to go and explain a quality problem and why it won't happen again!" Distance was always a problem. His own key accounts were both 90 minute drives in opposite directions, with factory units even more inaccessible; and some of the smaller accounts were further still. He himself lived an hour away. Still, he usually managed 12 visits a year to the key accounts, but the smaller ones had to be restricted to every other month.

Lunch was always a good time to compare notes and he was secretly pleased to see that he was further ahead on volume targets than some of the others. However, his post-lunch euphoria was short lived when he opened his emails to see notice of a claim from one of the smaller customers. Looking through his heap of papers for some background, he came across the summary from his recent appraisal. He had received much praise for the volumes he had achieved; but also noted that the 'value for money' project had been carried forward from the previous year's appraisal and that volume targets, like bills, just seemed to grow and grow. He also noted the discussion on leadership and networking. This had puzzled him a bit at the time. He was already a successful senior person

leading two KA teams and wasn't sure what more they wanted. What was he supposed to do? Copy Jack Welch, Akio Morita, or even Nelson Mandela? It was already hard enough to get people in other functions to do things without upsetting them by becoming one of those superior or rather pushy managers you meet sometimes.

If he was honest with himself though, he could see the point about networking to some extent. What people didn't seem to understand was that it was easy enough to drop in and see people when there was an issue, but once that was resolved, it was awkward calling them up when there was nothing to discuss. Sometimes it was almost a blessing when a problem arose. And where did they think the time for this would come from? He'd seen other people 'networking' at meetings and conferences and thought it looked rather insincere. Indeed, he wasn't at all sure that people welcomed it; cross border links were always difficult. Besides, he was a man of high standards and would rather not compromise himself, unless he had to.

Returning to the claim, Andreas added it to his 'To Do' list and clicked back onto his Inbox. Aha! There was an email from EDA. Perhaps Trudi had sorted out the design specification after all. Sadly, no. It was a request to see if he could chase an unplanned order. The problem was that the supply chain had very specific lead times. He was one of the best at getting his accounts' orders scheduled for the start of a run; but he knew this blind type was on a 40 day lead-time and his hands were tied. This was confirmed by a visit to the factory next door, but he did manage to extract a promise that EDA would be one of the first off when the run started. It wouldn't completely solve their problem, but it went some way towards it and gave him something positive to go back with.

As he sat back at his desk, he thought that he'd better update the records for EDA. Difficulties with short orders had been one of the issues they had raised, and he had put this as one of the top three issues to be addressed in the annual plan. Focusing on this had been very helpful and some real progress had been made, given the complexities of logistics these days. Having updated the file, his mind returned to the design update meeting. Remembering something he'd seen in a recent email, he searched the intranet and found the announcement of a new private residence initiative. Recognising the name of the person involved, he phoned on the chance of catching him at his desk. The chat proved quite informative and yielded some interesting data; which he resolved to pass on to EDA the next time he visited. Checking his emails, he quickly prepared a revised quote for his other key account, and turned once again to the forecast and immersed himself in the figures.

He surfaced some time later to find that the office was almost empty. Checking on Trudi, he found that Marketing had left for the day, and he'd missed Maria by now. Packing up his brief case, he left the office and took the now dark route home. As he drove, he re viewed the day. The design specifications were still nowhere in sight; it was almost like someone in EDA was working against the idea. Although he'd been busy today, there were bound to be issues tomorrow from his other accounts. In addition, the claim would be time consuming so he supposed he should make a start tonight if he was to have time for other things tomorrow. And where was the 'value for money' project now? What realistically could he do? Stop responding to the customers? Ignore his targets? What?

Discussion topics:

1. Is Andreas a good key account manager? If yes, why? Or why not?
2. Why do you think Andreas behaves the way he does?
3. Is there anything he needs to do more of or less of? What?
4. If you were Andreas' manager, what would you say at his next appraisal?
5. What should the company change to make his role more effective?