



The Association for
Key Account Management

Diploma competency workbook

4

Relationships and interaction

Name:

Organisation:

Date:



4.1 Customer categorization and relationships

Supporting items of evidence submitted (if applicable):

Customer attractiveness

- Recognises the link between customer attractiveness and the achievement of corporate strategy
- Recognises and accepts that customer attractiveness is dependent upon their potential for superior returns on investment rather than current turnover.
- Understands and accepts the quantitative and qualitative criteria used to identify strategic customers by their potential for profit.
- Rates customers objectively and accurately against criteria when requested.
- Categorises own customer portfolio similarly.

Relational states

- Is aware that different states of relationships with strategic customers exist, with different characteristics, climate and potential.
- Makes informed choices about the nature/state of the relationship that should be developed with each key customer
- Develops relationships to the agreed level and does not over-invest time or money to develop them beyond the appropriate stage.
- Recognises opportunities and action appropriate to the relational state and works with them.

Relationship management

- Prioritises key customers over others.
- Maintains relationships at all levels in the customer's organisation, including senior managers.
- Seeks, develops, and maintains relationships across a range of the customer's functions.
- Feeds key contacts with appropriate and timely information and support.
- Identifies contacts open to competitors and protects business with them.
- Takes care to protect confidential communications.
- Demonstrates trustworthiness to the customer and actively maintains it, personally and organisationally.
- Sets up a system of explicit relationship governance with the customer that specifies participants in the relationship, meetings, access to information, decision-making powers etc.

Relationship development

- Adopts a purposeful approach to building and maintaining relationships and has a plan of action for it.
- Recognises valid relationship constraints and works with them: e.g. both parties' perceptions of the strategic importance of the other.
- Identifies gaps/missing/poor relationships in the customer organisation and pro-actively develops them.
- Appreciates the personal professional issues and needs of contacts (e.g. reputation, innovation, management capability) and develops relationships by responding to them.

4.2 Internal relationships and key account teams

Supporting items of evidence submitted (if applicable):

Internal allies

- Respects colleagues and understands the role of internal relationships in achieving goals.
- Takes time to build internal relationships.
- Identifies key allies across the organisation and proactively builds relationships with them.
- Builds relationships with several senior managers.
- Identifies the interests of potential allies and adapts approach accordingly.
- Is aware of geographical and cross-functional boundaries, why they exist and how they operate.
- Understands how to overcome internal boundaries using influence and negotiation.

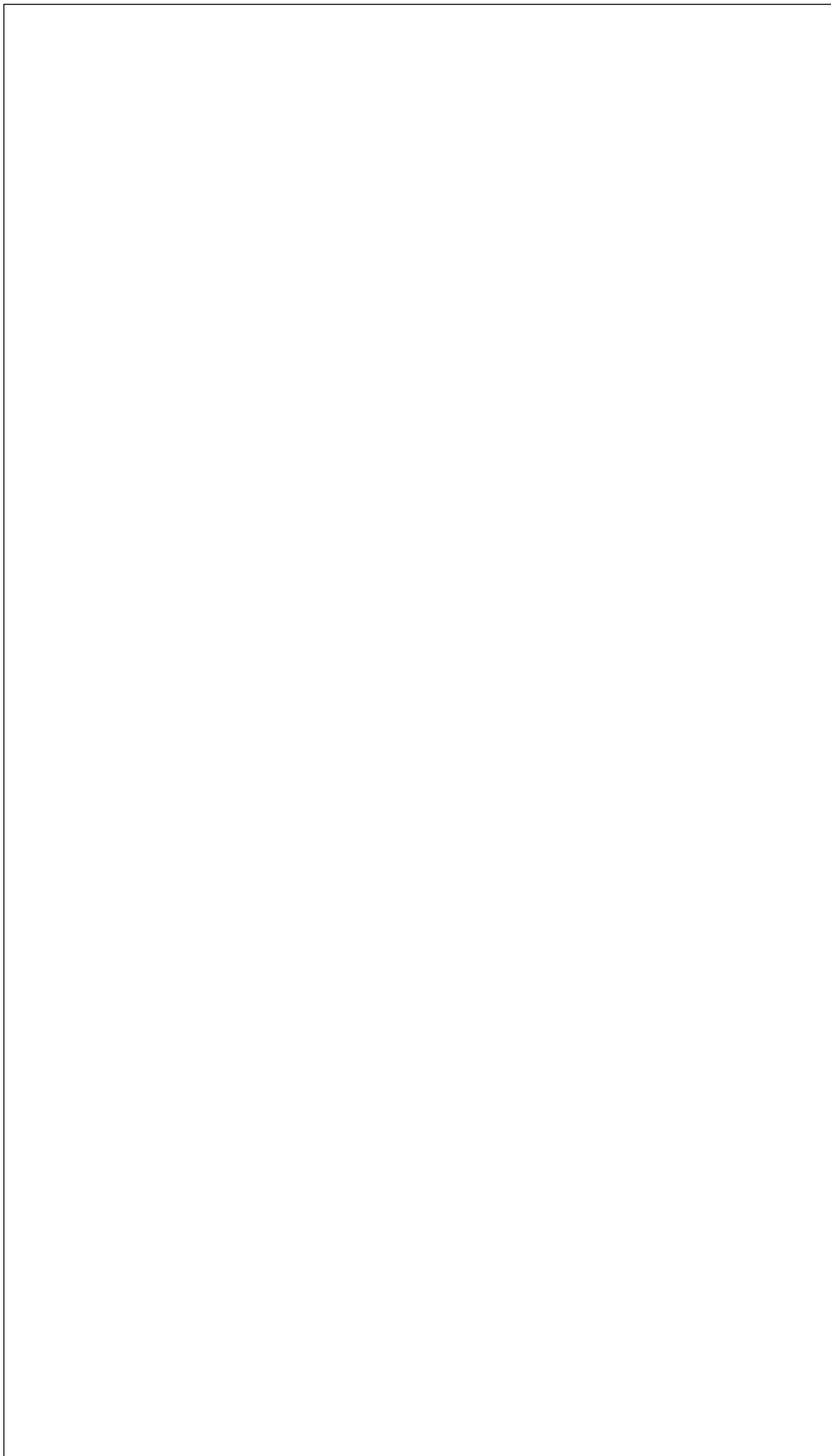
Cross functional working

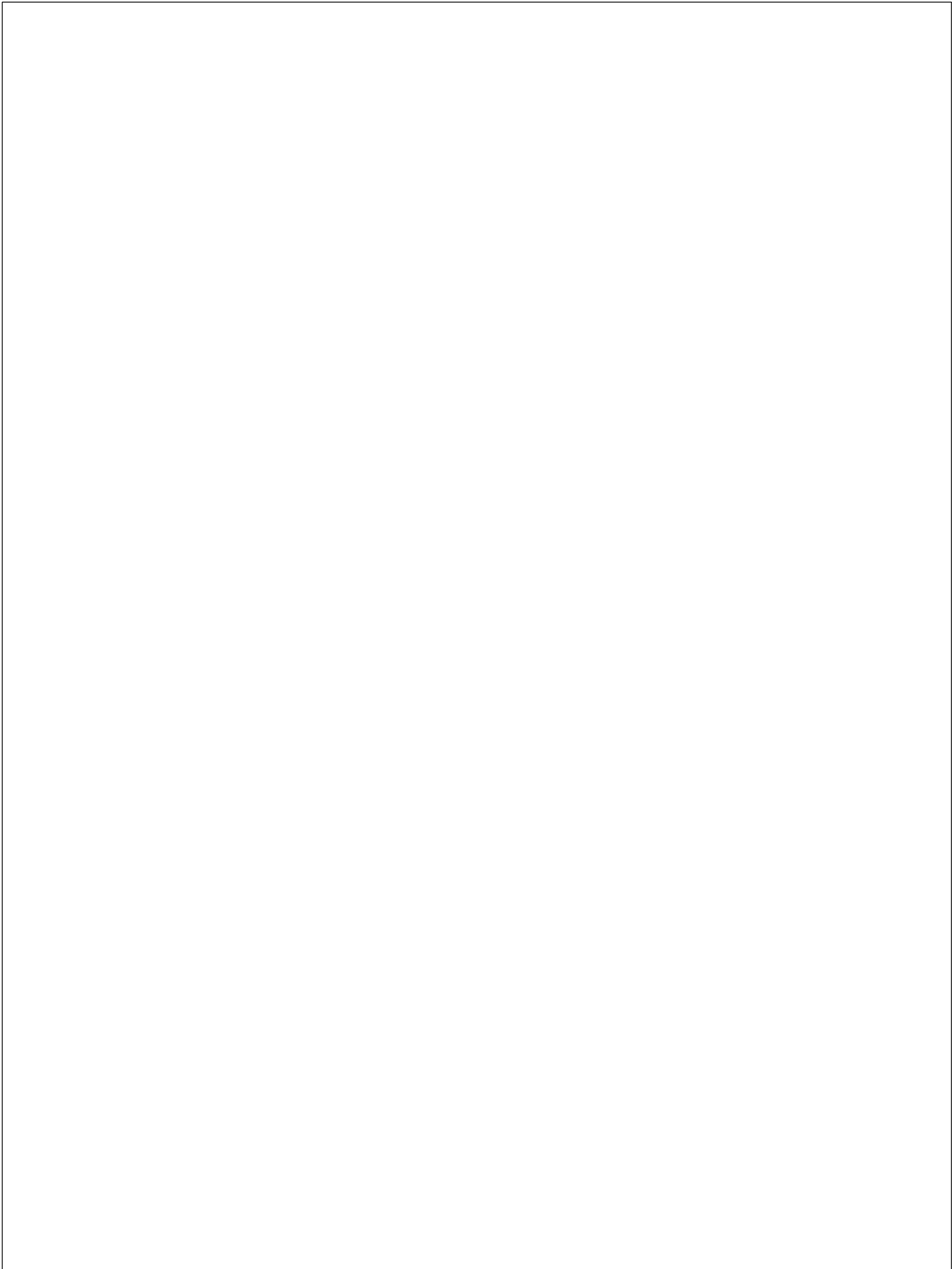
- Recognises what the KAM function can and cannot itself supply to customers.
- Recognises the role of other departments in delivering benefits to key customers.
- Understands the needs, concerns, culture and capabilities of internal functions and responds appropriately.
- Introduces expert members of other departments to their customer counterparts.
- Keeps customer-involved people up-to-date on customer developments, objectives, strategy and tactics.

- Encourages members of other departments to work directly with the customer.
- Clarifies his/her requirement for feedback and decisions from such interactions and maintains a level of visibility and oversight of all interactions with their key customer/s.

Personal integrity and trustworthiness

- Ensures responsibilities and accountabilities are clear within the internal key account team.
- Follows through and reliably implements agreed actions and proactively deals with underlying requirements.
- Recognises and pays attention to important detail, but does not get mired in unimportant detail or others' responsibilities
- Lives the organisation's values.
- Maintains confidentiality as required on sensitive information.
- Makes others aware of personal standards and sticks to them.
- Operates comfortably with uncertainty and complexity while remaining personally predictable and consistent.





4.3 Collaborating

Supporting items of evidence submitted (if applicable):

Effective collaboration

- Recognises and responds appropriately to the collaborative nature of business with key accounts.
- Understands the nature and objectives of collaborative projects and helps parties involved to stay focused.
- Identifies assets and capabilities that her/his own organization needs to protect such as Intellectual Property (IP) and sensitive commercial information.
- Facilitates agreements on ways of working and approaches to conflict resolution.
- Considers and manages the commercial inputs and returns required by each party.
- Helps identify, assess and communicate risks.
- Proactively pursues initiatives with long-term mutual benefit.

Networking

- Demonstrates broad knowledge of the sector and influential people in it and maintains a database of valuable individuals.
- Participates in a range of activities and communication media to build and maintain connections
- Identifies key parties and builds strong relationships with them.
- Connects readily with professionals and shares relevant information in a timely manner.

- Formulates enquiries discreetly and readily gains information from others.
- Establishes personal gravitas and credibility alongside pragmatic 'street-wise' approach.

Political astuteness

- Analyses political landscape in own and customer's organisation.
- Understands and adapts to the outlooks, cultures and policies of collaborating parties.
- Identifies decision makers, opinion leaders and targets and their political positions.
- Recognises 'political' issues and develops plans to address them where necessary.
- Ensures expectations are clear and terms of the collaboration are locked down.
- Employs a range of influencing styles as different situations and individuals demand.

