

# Competency Development Toolkit

Account Management Benchmark



*Signature Profile*

## Benchmark Profile Description

The Account Management role grows sales to existing accounts by increasing sales to current buyers and/or expanding sales through new buyers within the account. Account Managers are tasked with building customer relationships, meeting or exceeding customer needs, and making it easy to do business with their company. Key activities include account planning and partnering with internal support networks to facilitate special requests, even in off hours.

## Predictive Competencies

- Drives Toward Success by Systematically Managing Accounts
- Increases Sales to Existing Accounts as a Means of Sales Excellence
- Fosters Collaboration to Achieve Shared Goals
- Engages Others in Learning to Maximize Benefit from Purchase
- Solicits and Acts on Customer Feedback
- Ensures Coverage and Responds to Customers

## Drives Toward Success by Systematically Managing Accounts

Consistently meets or exceeds sales targets through personally controlling the critical aspects of the sales processes; systematically works each account plan and anticipates problems in order to work around them; is driven to win customers' attention and treats their business as an honor, never letting them feel taken for granted

LOW SCORES	HIGH SCORES
<ul style="list-style-type: none"> <li>▪ May adopt a casual or relaxed approach that fails to project personal commitment or dedication</li> <li>▪ Is comfortable with achieving average results, rising above the bottom of the performance chart but not striving to be the best</li> <li>▪ Adopts a more interdependent and team-oriented approach to accomplishing goals</li> <li>▪ May depend too much on fate or 'being in the right place at the right time' rather than plan and work to make things happen</li> <li>▪ Expects account management plan to proceed without the need for careful monitoring and contingencies</li> <li>▪ Can take customer relationships for granted and may not work at continually demonstrating appreciation for the business</li> </ul>	<ul style="list-style-type: none"> <li>▪ Meets or surpasses sales goals as a means to gain more freedom and independence</li> <li>▪ Maintains personal control over those aspects of the sales and delivery process identified as top priorities</li> <li>▪ Sets high self-expectations and holds associates to the same stringent standards of dedication</li> <li>▪ Expects to encounter barriers a fair percentage of the time and prepares to deal with setbacks or delays in order to ensure the success of plans</li> <li>▪ Concentrates full energy and attention on systematically accomplishing key tasks</li> <li>▪ Places customers on a pedestal and shows them how valued they are</li> </ul>

### Mindset Tips:

- Commit to not just meeting, but exceeding, sales results by taking control of the sales and delivery process.
- Slowly elevate your sales targets until you reach the level of your peers.
- Gradually take control of the key aspects of the sales and delivery process – challenge yourself to take control of a different phase each week, until you are eventually in control of each step.
- Challenge yourself to achieve better than average results – do not become complacent with being in the middle of the performance charts.
- Never assume that plans will go as anticipated – implement a system by which you can ensure that key tasks are completed.
- Learn that waiting until problems arise is a waste of valuable resources – it takes much more time to correct a problem than to work around it in the first place.
- Remember that making your customers feel valued is an important key to your success – customers who feel underappreciated will take their business elsewhere.
- Understand that although a winning personality is an asset, charm alone will not win over customers.
- View contacts with customers as opportunities to demonstrate how much their business means to you.
- Never forget that your success is directly related to how much you appreciated your customers feel, there it only makes sense to make their satisfaction your top priority.

### Success Tactics:

- Review each phase of the sales and delivery process to determine where you may be letting things slide.
- Develop regular status reports that require you to check the status of accounts – it will make the monitoring process a part of your routine.
- Do not wait for customer complaints to arise - monitor progress so that you can spot and avoid obstacles before the customer knows that they exist.
- For each customer, make a list of potential problems – having an idea of trouble spots will simplify the monitoring process.
- Empathize with customers – treat them with the same appreciation and respect that you would want if you were in their shoes.

## Increases Sales to Existing Accounts as a Means of Sales Excellence

Motivated to advance in a sales career by increasing the product diversity offered to existing accounts; concentrates on finding avenues to generate increased sales from established accounts; works to increase revenue by identifying additional products to complement what is currently sold to the existing customer base

LOW SCORES	HIGH SCORES
<ul style="list-style-type: none"> <li>▪ May be satisfied with moderate growth in sales</li> <li>▪ Diverts resources from sales effort to respond to administrative tasks</li> <li>▪ May offer what is familiar to existing customers rather than build a repertoire of products or services that can match additional needs</li> </ul>	<ul style="list-style-type: none"> <li>▪ Driven to generate growth through account penetration and referral and directs effort toward building sales</li> <li>▪ Unwilling to settle for maintaining the status quo in generating revenue or increasing sales just incrementally</li> <li>▪ Prefers the efficiency of increasing sales with existing customers to spending the time cultivating new accounts</li> <li>▪ Takes advantage of opportunities to penetrate existing accounts via new product applications</li> <li>▪ Builds business with existing accounts by utilizing creative means to answer their needs with the products</li> </ul>

### Mindset Tips:

- Rather than seeking to expand your customer base, commit to maximizing the revenue gained from existing customers.
- Remember that it is often more efficient to penetrate existing accounts than to explore new leads.
- Learn that a satisfied customer will be more likely to purchase additional products and services than a new and possibly uninterested prospect.
- Do not become blinded by the initial sale that you forget to seek opportunities for additional sales – if customers are interested in one product or service, they may enjoy learning about others.
- Understand that trying to penetrate accounts by offering additional products or services isn't pushy –it is part of your duty.
- Challenge yourself to improve on previous sales results by selling additional items to existing customers – gradually increase expectations until you are on par with your co-workers.
- Listen to customers so that you can expand your sales offerings to suit their needs.

### Success Tactics:

- Compare your results to others within the company and/or team – strive to match their performance through account penetration.
- Schedule your day so that administrative tasks are completed early and, therefore, will not distract you from making customer calls.
- For each customer in your account base, make a list of all the product expansions, services, and alternatives that meet their needs and then present your findings to them.
- Get to know your products and services, including all their applications – armed with this knowledge, you can easily make suggestions that might lead to additional sales.
- Take detailed notes during customer calls so that you can research additional products or services that might meet their requirements.
- Suggest additional products or services – your offering may contain a solution to a long-endured problem.
- Analyze a different product each week or month until you are familiar enough with your product line to make suggestions to customers for additional solutions.

## Fosters Collaboration to Achieve Shared Goals

Shows skill and ease at working in groups; works with others to achieve better results and forges close working relationships and alliances in order to get things done; is quick to cooperate versus expect others to bend to own wishes; supports joint ownership and shared recognition for results; recognizes the advantages of group participation in planning and problem solving

LOW SCORES	HIGH SCORES
<ul style="list-style-type: none"> <li>▪ Functions as more of an individualist than as a team player</li> <li>▪ Finds it simpler or more convenient to focus independently on own tasks or direction</li> <li>▪ Prefers to exercise personal control over results and outcomes</li> <li>▪ More likely to emerge as a leader than an equal player</li> <li>▪ Believes compromise for the sake of cooperation can potentially threaten the quality of the end result</li> <li>▪ Wants to be personally recognized for individual contributions</li> </ul>	<ul style="list-style-type: none"> <li>▪ Works collaboratively in a group effort to effectively accomplish a goal or task</li> <li>▪ Put team and management objectives ahead of their own</li> <li>▪ Performs own role effectively on the team and helps team members as needed</li> <li>▪ Forges working relationships and alliances with others in order to get things done</li> <li>▪ Willing to compromise and give others the benefit of the doubt when there is a difference of opinion</li> <li>▪ Proactively shares information, ideas, suggestions, and support</li> <li>▪ Encourages joint ownership and shared recognition for results</li> </ul>

### Mindset Tips:

- Understand the advantages of group participation in planning and problem-solving – having a team to work with increases the amount of resources at your disposal to accomplish goals.
- Put your personal goals aside and accept your role and responsibilities within the team - realize the importance of the team's goals by linking their achievement to the corporate strategy or customer requirements.
- Learn that overall job success is more important than your personal achievements – share ownership for the results you and your team produce, stealing the spotlight will only have a negative impact on your career.
- Remember that listening to the advice, suggestions, and views of others is an essential part of every job – even people in positions of power have a staff of people working to help them achieve goals.
- Rather than viewing working in a team as a lack of control, view it as an opportunity to test your ideas and have them judged by more objective parties than yourself.
- Challenge yourself to put personal feelings aside in order to get the job done – you may not always agree with or like fellow team members, but you can still work with them effectively.
- Understand that working within a group does not limit your control – you are still responsible for making appropriate decisions and voicing your opinion if you disagree with the ideas or actions of team members.
- Welcome differences of opinion as a way to ensure the final product meets requirements – team members may be able to spot potential problems that you cannot.

### Success Tactics:

- Commit to working as a team member by proactively sharing your knowledge and support – help other team members to do their part in meeting group objectives.
- Complete your assigned tasks on time and to a high degree of quality and assist your team members in completing their tasks.
- Seek creative ways to resolve conflicts between you and your peers or team members when conflict arises – do not take issues to heart, but compromise in order to achieve final objectives.

## Engages Others in Learning to Maximize Benefit from Purchase

Helps the customer to gain maximum benefit from the product or service by committing to continuous education that provides information updates or product training; prepares more structured sessions to cover the most critical areas of learning; stays on top of information needed by customers in an effort to serve as a resource; takes responsibility for motivating customers to update their information; reinforces shared information through periodic repetition; routinely adjusts education process to address individual and group progress or understanding

LOW SCORES	HIGH SCORES
<ul style="list-style-type: none"> <li>▪ Prefers one-on-one training or a more loosely organized curriculum to the structured requirements of a scheduled class session</li> <li>▪ Expects the people being trained to be self-motivated to learn and becomes impatient when required to repeat or reinforce already covered information</li> <li>▪ Does not implement a tracking process for assessing the effectiveness of teaching efforts or the progress of trainees</li> <li>▪ Enjoys working on content delivery and may be more concerned with the audience's assessment of own public speaking skills than with the subject matter</li> <li>▪ Tries to make the training entertaining at the expense of providing only relevant information</li> </ul>	<ul style="list-style-type: none"> <li>▪ Prepares scheduled and consistent programs to train or educate others</li> <li>▪ Establishes measurable criteria for assessing progress in the learning process</li> <li>▪ Demonstrates patience and a willingness to repeat or reinforce ideas and information until the audience understands</li> <li>▪ Focuses training sessions on those competencies that will make a difference in the group's ultimate effectiveness</li> <li>▪ Concentrates more on the results produced or change accomplished through training than with how attractive or entertaining the training can be</li> </ul>

### Mindset Tips:

- Remember the importance of providing your audience with a formal training program that establishes key concepts and introduces new ideas and developments.
- Resolve to, not just educate your audience, but also to help them to maximize their performance.
- Accept the responsibility of remaining up-to-date so that you can be a constant resource to others.
- Commit to revising your training presentation every month so that new developments can be incorporated.
- Understand that the most effective training presentations are those that strive to make a difference by relating relevant information.
- Realize that by remaining up-to-date and passing along new information to your audience, you position yourself as a valuable resource.
- Understand the need to prepare a formal training program in order to ensure that you sufficiently cover critical areas of learning.
- Realize that your role is to reinforce basic concepts, but it is also to impart up-to-date information – if your presentation is not relevant to the group's current work environment, then it is not very valuable.
- Commit to increasing your group's competency and productivity – take responsibility for ensuring that they understand all key information, including basic concepts as well as new developments.

### Success Tactics:

- Choose a few key issues or goals for improvement and focus your presentation on those subjects.
- Combine “the basics” with more complex concepts to ensure learners are continuously upgrading their skills and knowledge.
- Review your presentations with a colleague or superior – ensure that you provide key concepts as well as new information.
- Create a lasting impression on your audience by giving a presentation that will make an impact on the audience's ability to perform.
- Devise a lesson plan – trying to teach in an informal manner could lead to you simply scratching the surface of important topics.
- Remember that your goal is to improve your audience's skill level, not just to have your presentation enjoyed – make sure that you are adequately covering critical issues and not wasting time with superfluous information.

- Do not try to dazzle your audience with irrelevant information or a slick presentation style – your job is to make learning easy and fun, but do not sacrifice substance for style.
- Limit your programs to those skills that are key to your group’s success – make a list of the key concepts you will cover and use it as a visual prompt in case you start to wander into other subjects.
- Make the improvement of your audience’s skills, methods, and techniques your primary goal – do not seek to merely entertain.
- Build tracking systems into your program so that you can gauge whether or not you are effectively communicating your message.
- Create training plans and then review them to ensure that you cover both old and new issues and that you spend an adequate amount of time on each.
- Review coaching plans regularly – clarify and reinforce ideas that groups had trouble understanding and add new developments in critical areas so that your audience can be up-to-date.
- Sit in on the presentations of an effective trainer – take notes and try to utilize those techniques in your own presentations.
- Stick to those issues that will have the greatest impact on overall results – do not try to incorporate every related piece of knowledge or you could overwhelm your audience.
- Take responsibility for helping your audience learn – if someone asks you to repeat information, do not become impatient – this is a sign that you did not adequately reinforce the concept to begin with.
- Use the feedback of the audience to strengthen the quality of your presentation.
- Work with a colleague who has exceptional training skills – review your presentation with this person to see where your program can be streamlined and where more substance needs to be added.

## Solicits and Acts on Customer Feedback

Seeks customer feedback regularly to verify satisfaction and uncover minor issues which could escalate if left unattended; solicits suggestions for continuous improvement and demonstrates personal attention to the customer even when there is no problem; listens to feedback without judgment or defensiveness, remaining focused on results rather than personal feelings; stays logical and objective and refrains from expressing personal frustrations; ensures future business by anticipating and removing potential sources of dissatisfaction

LOW SCORES	HIGH SCORES
<ul style="list-style-type: none"> <li>▪ Assumes that a customer will speak up if there are problems but is otherwise satisfied</li> <li>▪ Tends to 'let sleeping dogs lie' and is reticent to search for problems that may be in the early stage of development</li> <li>▪ Finds it difficult to keep emotions in check and remain logical when presented with suggestions for improvement</li> <li>▪ Takes customer feedback or criticism as a personal jab and may inappropriately display a negative response</li> </ul>	<ul style="list-style-type: none"> <li>▪ Demonstrates continued personal attention to the customer, calling regularly and soliciting suggestions for improvement</li> <li>▪ Disciplined and consistent in initiating contact with the intent of monitoring satisfaction and detecting potential problems</li> <li>▪ Welcomes opportunities to demonstrate a willingness to make the customer's experience even better</li> <li>▪ Aims emotional intensity at addressing a customer's needs or concerns, not at the customer personally</li> <li>▪ Does not allow the mood or feeling about a customer to alter the degree or quality of the follow-up</li> <li>▪ Maintains a business relationship versus a social relationship in 90% of the contact</li> </ul>

### Mindset Tips:

- Understand the importance of maintaining regular contact with customers through regular visits so that you can monitor satisfaction levels and address potential problems.
- Realize that everyone is eventually faced with a customer complaint – therefore it only makes sense to remain objective and work to address the problem.
- Take personal responsibility for uncovering possible issues – do not wait for the customer to complain, but search for seeds of dissatisfaction and immediately address them.
- Commit to demonstrating personal attention to customers even when there are no problems evident – doing so will prevent issues from snowballing and convey a sense of caring to your customers.

### Success Tactics:

- Regularly collect feedback from customers about the quality of products and services they receive from you and your organization.
- Check-in with customers frequently, outside a sales situation, to inquire about their level of satisfaction.
- Train yourself to regularly call on customers so that you can spot potential problems before they get out of hand.
- Do not wait for customers to contact you with complaints – be proactive by designing a detailed call schedule that includes questions that will unearth areas that require improvement.
- Thank customers for alerting you to problems with your products or services – customers who complain may be more open to doing business in the future.
- Use feedback from customers to identify ways to serve them better in the future and view their complaints as challenges that, once overcome, will improve your relationship with them.
- Actively solicit feedback on where you could provide better service – use this information to improve your performance and demonstrate dedication to your customers.
- Start each customer call by talking about what has worked well in the past, and what you can be doing differently to serve them better.



## Ensures Coverage and Responds to Customers

Organizes time to cover ongoing priorities and will make arrangements to cover whenever absence is unavoidable; understands that rewards are commensurate with effort and invests the time to get the job done; uses time efficiently during regularly scheduled hours so that extra hours are not inevitable, but is responsive to additional requirements or demands when necessary

LOW SCORES	HIGH SCORES
<ul style="list-style-type: none"> <li>▪ Believes personal time is off-limits and may resist interrupting leisure activities to deal with work demands</li> <li>▪ Loses control of their action list and can become overwhelmed by ongoing priorities</li> <li>▪ May not feel a need to put forth more effort, but will accept delays instead</li> <li>▪ Allows outside distractions, commitments or time demands to consistently take priority and prevent an efficient use of time and resources</li> <li>▪ Fails to put into place systems or resources to cover account needs if they are unprepared or unavailable, creating delays in response time</li> </ul>	<ul style="list-style-type: none"> <li>▪ Available after hours to respond to the needs of both internal and external customers</li> <li>▪ Organized and efficient in how time is spent during the day so that the need to work unscheduled hours is the exception rather than the rule</li> <li>▪ Resists the distraction of nonwork-related issues that can interfere with the coverage of ongoing priorities</li> <li>▪ Accepts that a strong sense of duty to those who are counting on them cannot always be met during regular working hours</li> <li>▪ Prepares a back-up system to cover unpredictable or unpreventable overloads in any absence</li> </ul>

### Mindset Tips:

- Remember that since your workload will vary, there will be times when working extra hours will be unavoidable.
- Understand that continually making optimum use of your work hours will reduce the amount of personal time lost to workload demands.
- Realize the importance of having a back-up plan – you will not always be available after hours and must have a system in place to handle issues in your stead.
- Even though you may be available after hours, there will be times when multiple problems arise – make certain that you prepare someone to assist you

### Success Tactics:

- Commit to organizing your time so that the number of extra hours you need to work are reduced.
- Maintain a To Do list to keep track of tasks and prevent you from feeling overwhelmed.
- Pair up with a colleague who effectively organizes his workload – take note of techniques you can use in your own schedule.
- Check libraries and bookstores for reading material that deals with the subjects of organization and time management.
- Devise a system by which you can monitor internal and external customers and anticipate potential issues before they become problems that require your personal time.
- Analyze your work process and evaluate where you may be wasting time - modify your work habits so that you maximize work hours and minimize after-hour demands.
- Identify those who are responsible for handling issues in your absence – ensure that they know they are to be held accountable.
- Compose a public file for each internal and external customer so that others can come up to speed should you be unavailable.
- Prepare someone to take over when you are unavailable – fill that person in on all details pertinent to each customer.
- Create a list of people in your department who would be able to answer particular questions and solve customer problems when you are unavailable.



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