



# The Profile of a Best-in-Class Strategic Account Manager

*The Definitive Guide to Identifying the Best Candidate to Manage and Lead Strategic Accounts*

*A Chapman Group eBook*

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## Introduction

One of the most common challenges The Chapman Group helps organizations solve is hiring the right Strategic Account Managers (SAMs); the role designated for effectively and profitably managing an organization's relationship with its strategic accounts. Most SAM organizations are derived from a successful sales operation, and organizations believe that those sales representatives, who were responsible for the sales success, will also be the best candidates for leading the SAM organization to success. The challenge is that this is not necessarily the case: the best sales people do not always make the best strategic account managers. The strategic account manager is a key role to define, especially considering that their leadership and implementation of the strategic account management strategy are 2 of the most critical determining factors of a strategic account management organization's success.

What follows is a series of previously published blog articles that define and explain "the profile of a successful Strategic Account Manager". We are going to break the definition of the SAM profile down into 5 distinct elements with supporting criteria for you to benchmark SAM performance. Those 5 elements are:

- *Part 1: Behaviors*
- *Part 2: Competency and Aptitude*
- *Part 3: Skills*
- *Part 4: Style*
- *Part 5: The Intangibles*

We hope that this guide helps you and your strategic account management organization improve the performance of your strategic accounts, by improving the way that strategic account managers are recruited and selected.

## Part 1: Behaviors

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The first element of the strategic account manager (SAM) profile is *behavior*. In our experience, it is best to look for a strategic account manager that naturally conducts themselves according to the descriptions in the chart below. While the listed behaviors described below can be taught and learned, the most successful SAMs intrinsically display a pattern of behavior that matches those described in the chart. SAM candidates who do not naturally behave according to the pattern below and must be taught these behaviors are the least likely candidates to be successful in the role.

### Behaviors

BEHAVIOR	DESCRIPTION
<b>FILO;</b> <i>First in Last Out</i>	The SAM role is by definition, time consuming – there are no short cuts – it requires an individual who is able to and willing to execute and commit to the efforts and time necessary for success.
<b>Exemplary role model / Leader</b>	Provides the model for success for the whole team; presentation, quality, communication processes and skills, etc. Reflects being the “best” and/or extraordinary in their role for both the account and the company. Assumes and executes leadership.
<b>Professionalism</b>	In all ways presents self, company and solutions in a manner that any account would find extraordinary. Respects others as a matter of everyday life practices.
<b>Customer-centric</b>	Places the customer at the center of their business universe. Listens to their customer and responds appropriately. Appreciates the importance of the relationship for all parties.
<b>Fiscally responsible</b>	Understands and manages organizational and customer finances and the dynamics of the mutual financial impact of the relationship.
<b>Measures efforts and progress</b>	Maintains a scorecard to support their action / reaction that is necessary to obtain goals and objectives. Always knows where they are against goals and expectations.
<b>Willing to take chances / change</b>	Appropriately offers alternatives as solutions to challenges. Always thinking how to improve, foresee, prevent and resolve issues. Respects inputs / ideas of others (customers and their own organization) when they may differ from their perspective.
<b>Takes Action</b>	Action oriented to get things done and resolved. Works toward timelines, goals and expectations.



While many could add other desired behaviors, it is our intent to help build a base of appropriate SAM behaviors that you can build from for the future. Beginning with a person who demonstrates the above mentioned behavior is a great start to identify an effective SAM; but remember, behaviors only speak to one fifth of the complete profile of a successful and effective SAM.

## Part 2: Competency and Aptitude

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*Competency* and *aptitude* are distinctively different profile components; take a look at the definitions:

***Competency:*** *Trained or innate capability that a person can effectively execute*

***Aptitude:*** *Degree of learning ability*

While these are distinctly different components, the actual capability of executing a competency at a high level of effectiveness may be influenced by one's degree of aptitude to learn the competency.

This highlights the importance of evaluating and understanding proven experience, degree of education and other indicators that validate that the individual in the SAM-designated role will be able to learn the required competencies, though some are not easy to learn and/or execute.

The chart below lists and describes the competencies of an effective SAM and then also documents the degree to which a high aptitude in that capability can affect the development of the specified competency.

Here are the definitions of the different levels of aptitude affect:

- ***None*** – *no effect, this competency is either present or not.*
- ***Low*** – *a competency that is very hard to develop despite aptitude; in extreme cases, candidates who do not naturally possess the capability but have a high aptitude can be developed, trained and coached.*
- ***High*** – *a competency, that given the aptitude can be developed, trained, and coached.*

## Competencies & Aptitudes

COMPETENCIES	DESCRIPTION	APTITUDE AFFECT
Financial and Business Acumen	An acute level of knowledge and intuition on; business organizations, operating procedures, trends and the key financial metrics / ratios that often predict and measure business success.	High
Problem Solver	Can listen to complex challenges and logically work through the root causes of the challenges and offer several options that may address the challenge.	Low
Creative / Innovative	Can create solutions to challenges or visions that may have otherwise not been defined or executed. Does not need an existing solution template in all cases. Effective at free-form solution development and relationship management.	None
Technology	Technology-literate at a level to effectively utilize the Microsoft Office suite of products including quality development of basic presentations, spreadsheets, communication documents and cell phone applications.	High
Senior Level Interaction	Comfortable and able to engage and coordinate initiatives with senior leaders in a variety of business situations. Would most likely prefer that these types of relationship engagements were their primary focus.	Low
Thought Leadership	Continuously develops their individual knowledge level around industry or business practices, trends and/or events to substantiate their value to a client.	High
Working knowledge of products / services	Knows well enough to be credible the products and/or services that they represent. As well as their value and effective utilization in the marketplace.	High
Competitive / Results Oriented Practices; Measures Progress	Commonly utilizes tools to track and chart their performance and/or the progress within a project as compared to other people and/or projects.	High
Team Builder	Can assess and engage talent to be a motivated and passionate part of the team.	Low

What is important to note in closing is the necessary support structure a SAM organization needs to develop and/or maintain competencies. Once hired, it is important that an organization continues to develop the list of competencies above – times change, business changes, and so do the requirements of customers...A successful SAM will take the initiative to adjust and get better, and the organization needs to make the resources available for the SAM to hone their craft and strengthen their competencies, and improve.

### Part 3: Skills

As we continue on Part 3 of our journey through the profile of an effective and successful Strategic Account Manager, we are now ready to explore SAM *skills*.

It is recognized that skills can be taught and learned. They do need to align to a particular task or role, as well as an individual's personal learning capacity. Often these are best characterized by the individual's behavior profile and a job match pattern.

Once it is determined that an individual is the right person for the role of SAM the following is the recommended skill set they will need to effectively execute their job on a daily basis. There may be additional skills required of a SAM specific to your organization; however, for this profile we are referring to the top 7 cross-industry skills that SAMs need to be proficient in to succeed at their job.

#### Skills

SKILLS	DESCRIPTION
Effective Communication / Listening	Demonstrates the ability to be an active and involved listener. Able to process concepts as presented regardless of their own background and behavior style. Uses language and concepts that align to their contact and client.
Negotiations	Able to identify all ongoing negotiating situations (almost all situations are negotiating situations) and facilitate WIN/WIN outcomes. Can fairly represent the client as well as their company.
Linking (concepts to actions)	Can create and effectively communicate solutions to challenges or visions that a client may need and/or share. Solutions may not have been clearly defined or executed. Does not need an existing solution template in all cases. Effective at free-form solution development and relationship management.
Planning & Organization	Manages opportunities, time, projects, relationships and account knowledge all in an organized and documented manner. Enables others on internal and/or external team to be informed.
Leadership	Shows the way for their team by representing extraordinary standards of practices relative to behaviors, values, time management and client development. Leads and inspire by example. Earns respect of others. Always thinking "Team" not "I"

<b>Problem / Conflict Resolution</b>	Thinks and acts logically (does not react) to challenges and problems. Has a goal of root cause and resolution – enabling issues to be resolved and not return. Can maintain self-composure and calm of situation through complex and emotional situations. Keeps everyone on task and sensitive to needs of all parties.
<b>Relationship Building</b>	Adapts to and accommodates many diverse personalities, behaviors and needs of individuals. Able to place their own styles and behaviors in a secondary position to accomplish their task. Relationships are important to them. They are authentic. They focus on the other party; more outward in than inward out approach. Can mesh with diverse people, cultures and interests.

#### Part 4: Style

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*Style*, often closely linked to personality, is one of those very challenging characteristics and attributes of a SAM since many elements of style are more who the person is (and may always be) versus who they may need to be – more about assessing a person's own style and then mastering it appropriately to fit the SAM role.

Style is an important element in the make-up of a SAM. A SAM will be presented with many challenges, in many different situations, from many diverse types of account contacts. This varies the operating environment of the SAM and may present the SAM with significant challenges to their own style preferences.

We do know from many studies and trainings that all people have their own predominant style. The question is not so much is their style right for the role of the SAM – the question may well be if they are able to understand what their style is, control it, align it and modify it based on the many unique operating environment challenges that they will be placed in during their role as a SAM.

What you do not want in the style of a SAM are those people that deliver their messages, in their own communication style (words, tones, non-verbal, etc.) in any way they want, or see fit – they choose not to change and/or adapt to the situation – they create an incongruence between them, the account and/or those around them – they are perceived as just not right for what is required..

One style does not and will not fit all the situational variables in the role of a SAM – so our first learning point when assessing the style of a successful SAM is that the most effective SAM is one that can chameleon between the following list of styles according to situation, context, and personality of individuals involved.

## Styles

STYLE	DESCRIPTION
Professional	Represents the consummate professional in all ways; timeliness, appearance, commitments, organizational skills, planning, knowledge, respect for others and passion for their role. Keeps learning and improving.
Deliberate	Not hasty to judgment; prefers to listen, think and then develop an appropriate response.
Collaborative	Knows and respects the value of the input from others. Also appreciates how important it is for others to know they are being heard. Places themselves as an equal Team member in group discussions and does not take a higher position regardless of their knowledge or position level.
Considerate	Always thinking about others – not themselves. Can immediately read a situation and identify the most appropriate actions that will facilitate win/win outcomes.
Team Oriented	All about the "Team" – not "I". Drives collaboration, involvement and across the team contribution. Is always making sure that all members of the team are engaged. Always looking for team wins.
Flexible / Adaptable	Can be comfortable in most any situation and with most any type individuals. Can make their dominate style and behaviors a non-factor in group dynamics. Adapts quickly and effectively based on their surroundings

## Part 5: The Intangibles

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The *intangibles* are the 5<sup>th</sup> element of the profile of a successful and effective strategic account manager (SAM). By definition, intangible means "nonmaterial or hard to define", which would make defining those (intangibles) an oxymoron of sorts. We do know, however, that intangibles exist and that they count for a great deal of "something" when determining success. We can liken the intangibles of a SAM to the characteristics and attributes of an athlete who is often referred to as a "winner" – they just have a way of making situations and the people around them better... or in other words, successful!

Of the all the parts of the SAM profile, intangibles are by far the most subjective component. They are very difficult to test for and to measure. As a result, the measurement of a person's intangibles usually requires a qualitative assessment of the SAM candidate and the personal and/or business life they currently lead, and have led. This assessment is much less structured than the previous 4 elements covered and will most likely be measured in a simple cliché, "they just have it".

As for what "it" is, here is a list of those intangibles to look for in a SAM.

## Intangibles

INTANGIBLE	DESCRIPTION
Drive and Commitment for Success	The relentless commitment toward tasks and accomplishment. Usually requires minimal leadership to sustain their motivation and drive. Their focus is more on a clear understanding of the mission and what success looks like; this is their goal.
Well-read	Values knowledge. Is in constant search of valuable nuggets of wisdom that will help them perform their role. They are constantly researching the web, books, conferences and other sources for knowledge.
Higher education	Has earned at least a college educational degree. It may be from any institution over long periods of time – but the accomplishment is there.
Willingness to do – has done	They really want to perform the role of the SAM. They see it as a good fit for who they are and where their career is heading. They take the initiative to seek out input and come prepared with questions.
Career match	The role is a logical progression in their career. It assimilates many of their previous career roles into one role. The SAM role is the opus of their career.
Integrity with a respect for others	They reflect a world of “them” versus “me”. They listen and can adapt to different types of people and environments. They value relationships and demonstrate the art of good manners. They run their life according to a strong value system – that is considerate of others.
Comfortable in senior level environment	They are able to be in the presence of and interact with experienced leadership. They have put themselves in this position many times previously. They seek out this type of interaction. They do know how to utilize others to help them accomplish this task.

## Conclusion

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In summary, a couple of points to remember:

- Always be looking for someone who is better than your best SAM
- Know the SAM candidate beyond the interview – solicit input from others
- Know the whole book of the whole person – not just the cover

This concludes our guide on identifying and employing a highly effective and successful SAM. We wish you the best on this important endeavor, and keep in mind that the SAM is often the face of your organization.

What face do you want your important clients to work with and depend on? Our profile of an effective and successful SAM has painted what we know is the face of SAM success. ***Study it and hire to it!***

## About the Author: Denny J. Chapman Jr.

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Denny J. Chapman Jr. joined The Chapman Group in 2003 and was named Managing Partner and Director of Business Development in 2012. As part of the Executive Team, Denny is responsible for Corporate Planning and Strategy Development. As the Director of Business Development, Denny works with his team to create business relationships with organizations that could benefit from the offerings of The Chapman Group. Before joining The Chapman Group, Denny spent some time “bussing” around the expansive plains of Montana and the mid-west as a pitcher inside the San Diego Padres minor league baseball system. Following his baseball career, Denny graduated from the Towson University School of Business with a Marketing Degree. Some fun facts about Denny: He spends his free time as the manager of a travel baseball team based out of Annapolis, MD. Also, Denny is an animal lover who has started his own “ark” at his home in Baltimore, MD with pets from all corners of the local pet store including, 2 dogs (a Westie and a Cairn), 2 cockatiels, 2 angel fish and 2 dwarf hamsters.

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## About The Chapman Group

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The Chapman Group partners with B2B sales and account management organizations to identify and solve sales and account management challenges resulting in stronger relationships, increased revenues, and higher margins for suppliers as well as our customers.

Our LoyaltyProfessional™ Voice of Customer (VoC) solution is designed to support a client's need to gain and then act on critical field-level customer facts and insights. Our solution includes:

- Measuring feedback of B2B customer relationships
- Capturing important data (customer facts / insights) through a unique electronic survey approach
- Ensuring customer data integrity utilizing our Loyalty Index methodology and expert consulting provided by our LoyaltyProfessional™ team
- Mining of data to highlight trends and key discoveries
- Analytical intelligence (reporting) on next actions for organizational success; The Chapman Group's Prescription for Success

As part of our end-to-end solutions approach, we also support and drive the final and most important element of “optimizing the customer relationship” – how to connect with and implement field-level action planning to create more loyal and committed customers. Our metric-based Strategic Account Management (SAM) process and best practices integrates the art with the science of managing strategic customers, enabling our clients to grow accounts by becoming more knowledgeable, efficient, effective and collaborative. We offer unique methods and software platforms to document and collaborate with customers on “account planning” and the “economic value” being delivered by the supplier and appreciated by the customer.

Learn more on how we can help your organization champion improved customer relationships, increased revenue and margins in today's highly competitive, global and economically focused business community by visiting our website at [www.ChapmanHQ.com](http://www.ChapmanHQ.com).