



WHAT GREAT ACCOUNT PLANNING LOOKS LIKE:

A conversation with Denise Juliano, *Group Vice President of Life Sciences*, Premier, Inc.

By Steve Andersen

President and Founder
Performance Methods, Inc.

For over 20 years, the SAMA community has been an amazing learning laboratory for Performance Methods, Inc. (PMI) and for me. SAMA has provided us with opportunities to co-create value with industry leaders across the globe. SAMA has provided us with opportunities to expand our understanding of how leading organizations and their key and strategic account teams build trust-based relationships and drive growth with their most important customers. And SAMA has provided us with opportunities to align and connect with top-performing SAMs and KAMs in practically every major industry, to observe and model the *what*, *how* and *why* of their success.

I've known Denise Juliano since her days at a large, global pharmaceutical company, and she typifies SAM/KAM top performance on every level. She participated in the best practices discovery and assessment that PMI conducted a few years back, a consulting project through which we interviewed SAM/KAM top performers, thought leaders and stakeholders to evaluate the current reality of strategic account planning, management and review. In this discussion, and the opportunities to work together that followed, it became abundantly clear that Denise has an approach for co-creating value and driving growth with customers that works.

Denise is not only able to articulate *what* she does to achieve mutual success with her accounts, but she can also explain *how* she engages and strategizes with her account

teams and her customers. Further, whenever I have asked her *why* she is making a certain choice or establishing a specific priority for facilitating value co-creation and relationship growth, she is able to explain with clarity and precision. Hence, when it was time to consider organizations and people for inclusion in the book I published in 2016, *Beyond the Sales Process: 12 Proven Strategies for a Customer-Driven World*, Denise was top-of-mind.

Each of the nine case studies included in the book averages five pages in length, and each features an industry-leading provider, SAM executive sponsors and stakeholders, a senior account manager and a selected customer. Denise was her organization's strategic account leader selected to participate, and her customer, Premier, Inc., agreed to be included, as well. If you want to read the entire story, grab a copy of the book. But suffice it to say that this case study unpacks into a story of how Denise and her organization evolved a "vendor"-level relationship to "preferred supplier," then to "planning partner" and ultimately...to "trusted advisor" level.

In what may be the ultimate testament to SAM excellence, Denise joined Premier in September of 2018 and serves her former customer today as their group vice president of Life Sciences, a role in which she bears responsibility for building and overseeing the execution of strategic growth, relationship management and solution delivery initiatives. She is leading Premier's implementation

and deployment of strategic account planning and management across the company and is a member of SAMA's Board of Directors.

When you execute SAM best practices so effectively that your customer asks you to join them and lead their SAM journey, it's obvious that exceptional things have happened. Denise has clear insights into what "great account planning and management looks like," and it is my pleasure to ask her to share her perspectives with the SAMA community. PMI developed the SAM Excellence and Benchmark Model shown here (Figure 1) through our extensive work within the SAMA community, and we'll use these categories to facilitate my conversation with Denise about what "great SAM" looks like today.

1. Culture, organization and leadership to support SAM

Steve Andersen: Denise, throughout your career and tenure within the SAMA community, you've had the opportunity to see the impact of culture, organization and leadership on

effective account planning and management. Could you please provide insights into how you see the role of senior leadership in providing sponsorship and support for SAM?

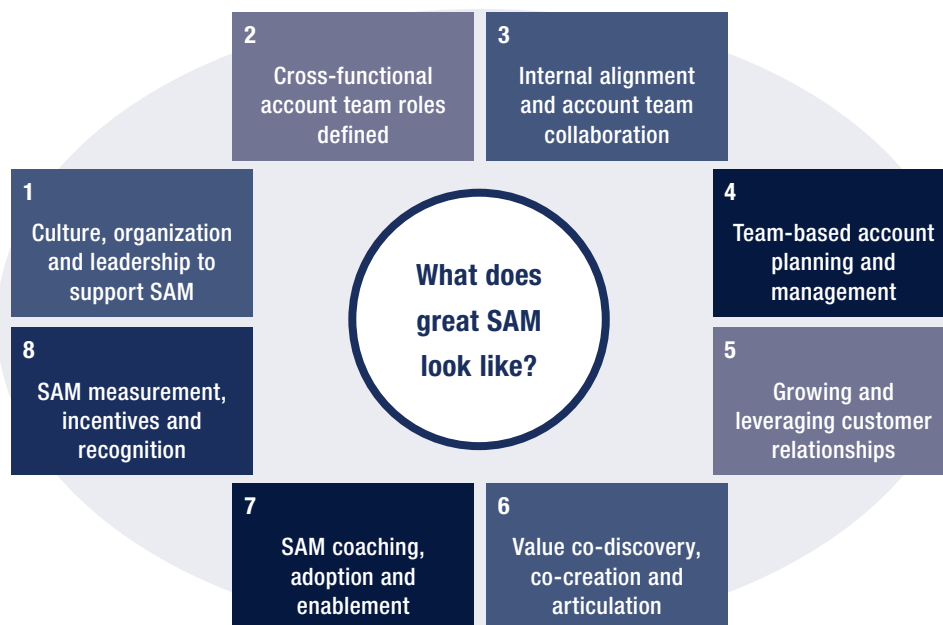
Denise Juliano: Senior leadership support and a culture that is conducive to putting the customer first are paramount to the success of any SAM program. Strategy matters, and mindset matters, but culture eats strategy for lunch! The sponsorship of executives for the program is critical to SAM effectiveness and this means that these senior leaders are not only aware of the deployment of account planning and management processes and best practices, but also engaged in deployment, specifically as executive sponsors for the account teams working with the organization's most strategic and important customers. I'm experiencing these dynamics now at Premier, and it's clear to me that when culture, organization and leadership align in support of SAM and are focused on customer success, amazing things can and will happen!

2. Cross-functional account team roles defined

SA: With so many companies today experiencing both organic and inorganic growth, it's becoming more and more difficult to ensure clarity regarding "Who does what?" on the cross-functional account team. How have you been effective helping teams that cross organizational boundaries gain clarity on their roles/responsibilities?

DJ: I've always believed in putting the best team on the field in support of driving mutual growth with my accounts and aligning them internally and then with the customer's team. But in order to reach that level of alignment, I discovered that I had to first become my own internal expert on my customer's business, and then become my company's internal expert on my customer and how they do business. With this in mind, I've always taken responsibility for educating my team on the customer's business, and have frequently had to educate the customer on our business. My experience has been that this type of cross-company/cross-functional expertise sharing can

Figure 1: SAM Excellence and Benchmark Model™ (source Performance Methods, Inc.)



go a long way in mapping the two organizations together... and actually create an environment in which each can effectively advocate for the other in pursuit of mutual value co-creation.

3. Internal alignment and account team collaboration

SA: It's been my observation that internal account team alignment (or lack thereof) can have a dramatic impact on SAM effectiveness, not to mention the organizational stress and dysfunction that can result when teams are not aligned. Do you have any best practices to share regarding how you have facilitated alignment within your account teams to drive more effective internal collaboration and cooperation?

DJ: I have always felt that great SAM means that we create relationships that can be “one-to-many” in nature, which further implies that both teams are aligned and that individual team members on each side can have a multiplier effect on growth and co-innovation. But this also requires that we understand the motivators or drivers on both sides of the table – what's motivating my customer's team and what's motivating my own team. With this in mind, we can align success at the “company” levels, and even begin to align success at more personal or “individual” levels. When this happens, the significance of the work goes beyond just the business at hand: it includes personal growth objectives on both sides of the table and a belief that we can be successful with our customers – both collectively as well as individually!

4. Team-based account planning and management

SA: Today's most successful account teams are embracing and deploying account planning and management as a “team sport” – far beyond what we were seeing even five years ago. Do you have any suggestions regarding how the contemporary SAM or KAM can evolve their account planning to more of a team-based approach?



DJ: I think that a sports analogy here is ideal, because while I've frequently found myself in the role of the SAM “quarterback” throughout my career, we all know so well that the quarterback without the offensive line is not going to be very effective. And this analogy even extends to defense and special teams: being able to bring in the right core and extended members to add value to the account team is a requirement if we are planning to grow with the customer and deliver our organization to co-create value with them. Modern account planning and management goes far beyond the historical “fill in the form” mentality that has haunted the account planning process in so many companies. Let's face it – we don't just want to be *talk-ing about the customer* – we want to

bring the customer into the meeting and make them part of the account planning process.

5. Growing and leveraging customer relationships

SA: Despite the occasional rantings on social media to the contrary, most in the SAMA community believe in the importance of developing trust-based relationships with customers, and you're a living example of what can happen as a result! Any advice on how a SAM or KAM can take steps to move in this direction, especially if they find themselves in the type of situation you were in with Premier?

DJ: I'm quoted in your book as saying that we were essentially nowhere in the Premier account. We had no real relationships in the C-suite, and there were no meaningful connections between our account team and the customer's team. Realizing this, it was clear that we had to do things differently if we wanted to see different results, and that started with me. What I did was begin to get on analyst calls and understand what was important to the people at Premier on an individual level. And this meant investing the time required to do co-discovery effectively, and engaging differently. People want to do business with people they trust. I believe that when you have trust-based relationships, all things are possible, and without it you are limited each and every day! Authenticity also is a significant part of growing trust-based customer relationships, and this means being fully aware and mindful of your customer's “care-about's” – collectively

as well as on an individual level.

6. Value co-discovery, co-creation and articulation

SA: Possibly more than ever, we're hearing industry leaders talk about the importance of co-discovering, co-creating and delivering value "beyond the product." Could you provide your perspective on why this continues to be an issue for so many organizations, and how they can effectively begin to address it?

DJ: This is a significant challenge for many organizations today, and certainly one of the most critical of the success factors for effective strategic account planning and management. But what these words really mean, at least to me, is that we have to truly understand what matters most to the customer, and why it matters to them. Seeing the customer through the lens of your product is a limiter the moment you walk in the door, because the bandwidth of your perspective has been reduced to their interest in a specific product or solution. In a world of commoditization, if we can't take our value to higher and more unique levels, including our human resources, the expertise and insights we bring to the customer and our ability to provide services that ensure customer success...then we're more "commodity than value," and likely to be treated as such.

7. SAM coaching, adoption and enablement

SA: I don't know of a single organization that doesn't feel that effective coaching is essential to SAM adoption and sustainability. Yet despite agreement on the importance of SAM coaching from first- and second-line managers, few organizations feel that they are where they need be. What are your thoughts regarding the importance of coaching, and how can our audience

take steps to implement this into their SAM programs?

DJ: The first thing I always try to do is "walk the talk." You can't credibly coach SAM/KAM success unless you're walking the talk, because if you're not behaving this way yourself, why should anyone believe that you know what you're talking about, much less how you can help them take their game to the next level. Also, coaching can't be only about sales pipeline and monthly forecast performance. If it's not focused on both short-term wins and long-term

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account growth, then it isn't coaching SAM, plain and simple. An effective SAM coach is there during the ups and the downs, and helps people recognize what's working and what's not. We need our SAM coaches to help plan and celebrate the wins, but also help them, during difficult times...to fail fast, capture learning and move forward.

8. SAM measurement, incentives and recognition

SA: When it comes to account planning, there's certainly no shortage of things to track. But my observation is that we sometimes fail to identify the "main things" that are the real catalysts for SAM success because we may be trying to measure too much. What's your perspective on SAM metrics and measures, and what types of things do you consider most important in

determining the effectiveness and impact of account planning and management?

DJ: It has to go beyond revenue recognition. If revenues from strategic customers are the result of SAM execution that has happened in the past, then we need to identify, measure, incent and recognize both the qualitative and quantitative components of effective account planning and management that ultimately drove the co-creation of the value that impacted these revenues. To reach and sustain great account planning, we need to first understand what is really causing success to happen. Then we should measure SAM performance both objectively and subjectively, ensuring that we focus on the impact factors that were collectively at work as the customer was connecting their success with the provider's value. And this should also include feedback from the customer about what's most important to them, because unless they are successful as a result of working with us, then we really aren't delivering great account planning and management!

SA: These topics and more will be covered in our session "20/20 SAM Vision: What Great Account Planning Looks Like in 2019" (Session 42) at SAMA's 2019 Annual Conference. In this facilitated panel discussion, Denise and two other practitioners from SAMA member companies will share their experiences and provide insights into "What Great SAM Looks Like." Audience participants will have opportunities to ask questions of the panelists and benchmark their own SAM effectiveness using a tool that will be provided. ■

Steve Andersen is president and founder of the Atlanta-based consultancy Performance Methods Inc. (www.performancemethods.com) and can be reached at sandersen@performancemethods.com. You'll also find him at <https://www.linkedin.com/in/steve-andersen-5442ab11>