

Cross-Function Account Team Working

Core to account management is the virtual account team - the bringing together of cross-territory or functional people to meet the needs of individual key customers. Although cross boundary working is essential in effective account management it often seems impossible to achieve in practice.

RM3 overcomes this problem because it enables cross-boundary account team working to be truly virtual. There are two barriers to cross boundary account team working:

1. Freedom to operate as a virtual account team
2. Motivation to work as an account team

Freedom to operate as a virtual account team

The theory of virtual account team working is straightforward; people are only part of an account team when they are actively doing something for the account. Reality is rather less simplistic for although an Account Manager may easily be able to prioritize her time across her accounts, others in her organization may have different priorities. A particular account for example may be very important to a Global Account Manager, but insignificant to a local National Account Manager or Country Manager.

This problem with competing priorities is often apparent when an Account Manager tries to involve the virtual team in building an account plan or reviewing a course of action. Difficult enough with a national account, taking people away from their function for half a day or so, but close to impossible and very expensive in the case of a global account. Yet, our research shows that business significantly increases when such teams get together to share ideas and solve problems. But does it justify the cost and disruption?

With RM3 each account has a Virtual Account Room accessed through a browser. Team members can enter the room to update information whenever they wish, join account planning sessions, send urgent messages to other members. They can work together live on an account situation or plan, or work sequentially in their own time. They can do all this without leaving their desk or home. This is true virtual account working. Working as an account team in this way is not time consuming, but something that is done as and when required, in minutes rather than hours. No longer is account planning an intermittent action that occurs just before a review, but part of a continuous activity, taking rarely more than a few minutes at a time. RM3 enables planning to become part of the day-to-day

Motivation to work as an account team

Training people to operate as cross-functional account teams to prioritize and adapt to specific customer requirements will succeed only to a point. People need to be motivated to do so. One of the best ways to motivate is to help people feel involved and valued. In account management this means ensuring that people feel their contribution to the decisions made about the account and its success, is recognized and valued. The constraint to involving all the people who could add value to the success of an account is time and logistics.

With RM3 time and logistics are not constraints. All can participate, all can contribute and all will recognize the value they bring to the party. RM3 helps you get a return on your CRM investment

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