



## CASE STUDY

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# Information, Payment and Technology Solutions Company

## Enterprise Account Management process, roles and implementation

### Situation

- Coming out from an initial public offering, company was structured by four distinct business units with minimal level of cross-selling
- Recently, an executive meeting between the firm and their largest account developed into multiple opportunities across all business units
- Because of that success, senior management believed that a Strategic Account Manager process would encourage stronger relationships across all four business units and drive increases of revenue and profit

### Challenges

- Senior management's objectives of the Strategic Account Management process were to address the needs of large accounts across all business units
  - implement a consultative sales approach
  - leverage C-suite relationships
  - establish "Strategic Partner" status
  - identify cross-selling opportunities
  - maximize revenue and profits

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#### **Actions**

- Developed a work plan that included a high-powered design team; namely, the executive vice presidents of the business units along with the vice president of Human Resources and a consultant to the CEO. Facilitated three work sessions that covered the following elements:
  - sales process map
  - value propositions
  - sales account strategies
  - strategic account definition
  - job descriptions of roles and profile
  - sales coverage/head count
  - organizational structure and governance
  - sales compensation measures
  - sales compensation plan
  - implementation plan
- As preparation for the first design team session, conducted a focused Strategic Account Manager role benchmarking survey to understand roles, structure and critical success factors, and leveraged by the design team to craft the right model for implementation
- Design team modified the sales process and re-named it the Enterprise Account Management process
- Additionally, these were some of the key decisions by the design team:
  - The design team expected that there will be a transition of the Enterprise Account Manager role. Initially, the role will not spend 100% of the time on enterprise accounts
  - Revenue recognition and accountability for the Enterprise Account Manager and Business Unit Sales Reps were defined
  - The profile of the Enterprise Account Manager demonstrates higher levels of selling skills characteristics than the Business Unit Senior Account Executive role
  - Financial and non-financial incentive measures were chosen
  - Sales compensation for the Business Unit Senior Account Managers was modified by adding multipliers for supporting enterprise accounts
  - Implementation plan was developed
  - Project manager was needed to oversee successful implementation

#### **Results**

- Increased penetration at enterprise accounts resulting in improved revenue, profits and cross-selling