Relationship Assessment
Basic tools for Key Account Management

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Scope of this document

Provide a quick description of a few tools that help;

• **assess the quality of the relationship** on a key account

• **build and implement a relationship development plan**
Position in global KAM/GAM Methodology

Value of a precise analysis of the relationship

- Understand the internal dynamic of the client
- Provides an overall picture
- Allows in-depth analysis of all human factors
- Strategic planning on the account
- Tactical planning & execution, preparation of specific negotiations

A crucial part of KAM!
Reminder: the buying centre

A classic way to describe the players of a buying process

- Initiators
- Gatekeepers
- Buyers
- Deciders
- Influencers
- Users

In reality, all players in a buying center have some sort of influence
What you should know

About your client contacts
- Their charter, how they are measured
- Their personal agenda and goals
- Their style and taste
- Current and future key projects
- What they think and feel about you and your company

About your own company’s material and activities
- All marketing material and activities that can be personally relevant to each of your contacts
- A sense of when to deliver them the right content
Basic tools for relationship assessment

Orgchart + Relationship
Matrix of key contacts + drivers for engagement
Map of position towards vendor/project
Ecosystem/Contact map
Results of client reviews / satisfaction surveys (not featured here)

Including graphic representation of vendor rating (from commodity supplier to vendor of choice and development partner)
Orgchart + Relationship (example)

CEO
  Name

MTS Division
  GM's name
    Sales Team
      Sales Dir. name
    Mktg Team
      Mktg Dir. name

VOIP Division
  GM's name
    Sales Team
      Sales Dir. name
    Mktg Team
      Mktg Dir. name

CFO Name
Corp Comm Group
  VP's name
    Internal comms
    PR Manager

Star Sales Manager
  name

Other sales managers
  ???

Local Sales Agencies
  ???

Relationship assessment tools

- Unaware or neutral
- Currently opposed
- Some level of interest
- Collaboration
## Matrix of key contacts and engagement plan

A solid account plan **must include this matrix** (the number of columns may vary according to the desired depth of analysis)

<table>
<thead>
<tr>
<th>Name / Function</th>
<th>Attitude towards your company</th>
<th>Areas of interest</th>
<th>Engagement</th>
</tr>
</thead>
<tbody>
<tr>
<td>All existing contacts but also important persons who should be contacted</td>
<td>1. Not aware 2. Opposed 3. Neutral 4. Advocate</td>
<td>Key drivers for this person Also, personal goals and data on internal politics</td>
<td>Goal and planned actions with their timelines</td>
</tr>
</tbody>
</table>
# Mapping influencers (Account management)

<table>
<thead>
<tr>
<th>Salutation</th>
<th>Last name</th>
<th>Position</th>
<th>Functional group</th>
<th>Decision making</th>
<th>Buy in</th>
<th>Attitude</th>
</tr>
</thead>
<tbody>
<tr>
<td>M.</td>
<td>Smith</td>
<td>CxO</td>
<td>General Management</td>
<td>Committee decision maker</td>
<td>Strong</td>
<td>Neutral</td>
</tr>
<tr>
<td>Mrs.</td>
<td>Swan</td>
<td>CxO</td>
<td>General Management</td>
<td>Not involved</td>
<td>Strong</td>
<td>Neutral</td>
</tr>
<tr>
<td>Mrs.</td>
<td>David</td>
<td>Manager</td>
<td>Quality</td>
<td>Contributor</td>
<td>Average</td>
<td>Supportive</td>
</tr>
<tr>
<td>M.</td>
<td>Daniel</td>
<td>Manager</td>
<td>Project</td>
<td>Committee decision maker</td>
<td>Strong</td>
<td>Neutral</td>
</tr>
<tr>
<td>M.</td>
<td>Finch</td>
<td>Team member</td>
<td>Technical</td>
<td>High Influencer</td>
<td>Weak</td>
<td>Neutral</td>
</tr>
<tr>
<td>M.</td>
<td>Jones</td>
<td>Manager</td>
<td>Purchasing</td>
<td>High Influencer</td>
<td>Average</td>
<td>Neutral</td>
</tr>
<tr>
<td>Mrs.</td>
<td>Andersen</td>
<td>Vice President</td>
<td>Technical</td>
<td>High Influencer</td>
<td>Average</td>
<td>Hostile</td>
</tr>
</tbody>
</table>

Courtesy eoKAM (KamUp! Application) - www.eokam.com
Mapping influencers (Account Management)

![Diagram showing mapping of influencers on a graph with axes for attitude and decision making.]

Courtesy eoKAM (KamUp! Application) - www.eokam.com
Mapping influencers (PA, PR, KAM)

<table>
<thead>
<tr>
<th>Advocate</th>
<th>Sleeper</th>
<th>Passive</th>
<th>Rarely</th>
<th>Latent</th>
<th>Opposed</th>
<th>Active</th>
<th>Often</th>
<th>Critic</th>
</tr>
</thead>
</table>

Courtesy Grayling www.grayling.com

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Relationship assessment tools
Ecosystem map example

Specialized internet portal

XOHANA is an intelligent portal focusing on very specific Market niches.

This map features both the constituencies and the channel to reach them.

Courtesy Herwig Rollet - CEO, Xohan

Developed with the Consideo Modeler

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Relationship assessment tools
## Internal Influencers programme matrix

<table>
<thead>
<tr>
<th>Complexity</th>
<th>Analysis &amp; Planning</th>
<th>Engagement (examples)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Simple</strong></td>
<td>Description of buying centre featuring each player with motivation and attitude</td>
<td>Selective distribution of relevant information and content</td>
</tr>
<tr>
<td><strong>Medium</strong></td>
<td>Precise account map with status of relationship with key contacts</td>
<td><em>Same as above plus:</em> Explore agenda and deep motivation. Leverage external influencers (individuals), and regular meetings with all key stakeholders. Client Reference Programme</td>
</tr>
<tr>
<td><strong>Advanced</strong></td>
<td>Networking and influence-building plan covering all relevant contacts</td>
<td><em>Same as above plus:</em> Executive sponsor, Vendor of Choice Prof., Customer Club, Customer Advisory Board</td>
</tr>
</tbody>
</table>
Need more, want more?

We provide training and consulting services in 3 languages (UK, F, D) for influence-oriented Marketing and advanced Key Account Management.

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