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**THE ROLE OF THE GLOBAL ACCOUNT MANAGER:
A BOUNDARY ROLE THEORY PERSPECTIVE**

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Sue Holt, Cranfield School of Management, February 2003

ABSTRACT

As the business environment takes on a global perspective for many business-to-business organisations, so the area of Global Account Management (GAM) has become an increasingly important issue for both researchers and practitioners. This study is focused on providing an in-depth understanding of the characteristics of the roles of global account managers in managing relationships with global customers. This aspect of global account management has received little attention in the literature with little empirical research in the area.

From the extant literature on *global account management, global account manager roles and relationships in business-to-business markets*, a conceptual framework of the global account manager role was constructed. This was supported by role theory, boundary role theory, and theory on the buyer-seller interface.

The research was conducted within the realism philosophical paradigm, using a qualitative case study approach with four co-operative case organisations. The research design was also grounded in boundary role theory, with data being collected from the global account managers, their managers, customers and their internal team members in order to provide a rich picture of the role. Semi-structured interviews were used to collect the data and the interviews were analysed against the conceptual framework using a qualitative data analysis package, QSR NVivo. Within-case analyses were carried out followed by a cross-case analysis. This resulted in the presentation of a set of validated role constructs, and a theoretical model of the global account manager role.

As well as the main findings from the empirical study, the research also produced some additional findings. The research makes a contribution to theory in two main areas: firstly to our theoretical understanding of global account management roles; and secondly, in extending and supporting existing theory on account management. Given the nature of the research topic, there were also implications for practitioners. Finally the limitations of the research and opportunities for further work were explored.

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CHAPTER 1: INTRODUCTION

This first chapter introduces the research topic. First, it builds the rationale from the researcher's perspective. It then builds it from the literature and finally, from the anecdotal evidence. The key objectives of the research are presented and an overview of the research project is given.

1.1 The Research Topic

The focus of this research project is to gain an in-depth understanding of the role of the Global Account Manager in managing complex and global customer relationships.

1.2 The Research Problem and Rationale: From the Researcher's Perspective

The choice of this topic initially arose from a personal interest as a practising marketing manager in the management of the interface between customers and suppliers in business-to-business markets and, in particular, of the role played by key people working at the interface; those in *boundary roles*. A research project undertaken in part-fulfilment of the MBA further stimulated the researcher's interest when the results indicated that personal relationships between those people working at the customer/supplier boundary are a central and critical part of the building and maintenance of long-term buyer-seller relationships. In particular, the roles carried out by the people responsible for managing customer relationships in such contexts appeared to be somewhat different from those typically described for sales type roles. This key interest has now been further explored in this PhD research which seeks to examine and understand the roles and activities of global account managers in managing global customer relationships.

1.3 The Research Problem and Rationale: From the Literature

It is over 20 years since David Ford suggested that in managing long-term business-to-business relationships there is a clear role for a *relationship manager* who is the major *contact man* for the client company and who takes responsibility for the successful development of the relationship with the client. It should be *someone of sufficient status to co-ordinate all aspects of the company's relationships with major clients at the*

operational level'. (Ford 1980). The idea of the *relationship manager* promulgated by Ford (1980) has materialised during the 1980s and 1990s. Often referred to as *national account management* (Shapiro and Moriarty 1980, 1982, 1984a, 1984b; Stevenson 1980; Stevenson 1981; Tutton 1987; Wotruba 1996; Weilbacker and Weeks 1997; Dishman and Nitze 1998), *major account management* (Barrett 1986; Colletti and Tubridy 1987) and more latterly, in the UK and France, *key account management* (Wilson 1993; Pardo, Salle and Spencer 1995; Millman and Wilson 1995,1996; Millman 1996; McDonald, Millman and Rogers 1996, 1997; Millman and Wilson 1998; McDonald and Rogers 1998) this specialised form of managing customers is gaining increasing importance in business-to-business markets. A newer form of this specialisation is also emerging in response to increasing globalisation; *global account management* (Yip and Madsen 1996; Millman 1996; Millman and Wilson 1999). Most recently the term *relationship manager* is also being used to describe these roles (Weitz and Bradford 1999).

Since the late 1980s there has also been an emerging interest in *relationship marketing* as an alternative approach to marketing management (e.g. Christopher, Payne and Ballantyne 1991; Grönroos 1994; Sheth and Parvatiyar (1995); Aijo 1996; Grönroos (1997); Gummesson 1997). In business-to-business markets, the operationalisation of relationship marketing for the selling organisation is largely carried out through those people in *boundary roles*, e.g. salespeople, Key Account Managers and, increasingly, Global Account Managers. These people play a key role in the formation of long-term buyer-seller relationships (Burger and Cann 1995; Biong and Selnes 1995, 1996; Doney and Cannon 1997; Weitz and Bradford 1999). Relationship marketing has also arguably brought a change to the practice of personal selling and sales management as a result of this increased attention on long-term, buyer-seller relationships (Biong and Selnes 1996; Wotruba 1996; McDonald, Millman and Rogers 1997; Piercy et al. 1997, 1998; Weitz and Bradford 1999; Wilson 2000). The salesperson's role in long-term relationships is changing to that of a *relationship manager* (Weitz and Bradford 1999). Increasingly, these people are also seen as key value creators (Weitz and Bradford 1999) for customers and for their own organisation.

Alongside the shift in the focus of marketing and the traditional sales roles, it is recognised that many organisations are now operating in a global environment. This has given rise to an interest in Global Account Management as a concept. Many view

this as a natural extension of National Account Management or Key Account Management (Millman 1996). However, a review of the literature has revealed that research in this field is at a very early stage and, while broad, generalised roles are discussed in the literature, little attempt has been made to properly define the roles, activities or skills required of Global Account Managers. This also applies to Key Account Managers and to the role of salespersons in long-term buyer-seller relationships. This, then is the gap that this study addresses.

1.4 The Research Problem and Rationale: Anecdotal Evidence

Additionally, anecdotal evidence from meetings of practitioners at the Key Account Management Research Club at Cranfield University¹, shows that significant investment is being made by business-to-business organisations who are seeking to retain customers by building long-term relationships; the prime orchestrators for this process are the salespeople and key account managers and for those operating globally, global account managers. Indeed, business-to-business markets are characterised by high expenditure on personal selling and service (Cunningham and Turnbull 1982). Managers are keen to understand the roles, tasks, skills and attitudes required of relationship managers in order that they can successfully implement and maintain a long-term relationship-building strategy and to identify how relationship managers can be more effective in their jobs. From informal discussions with an ongoing sub-group of the KAM Club (The Role and Skills Syndicate) of the KAM roles, it was revealed that while managers intuitively understand that this is a fundamental strategy for their organisations, they have little or no knowledge of their customers' perceptions of these roles, or the internal resources they may need in order to fulfil this different and challenging role. This is particularly so for Global Account Management. They are also concerned with identifying and developing the people who can successfully undertake this increasingly demanding job.

1.5 Research Objectives and Research Question

The objective of this research is to seek to build a more detailed profile of the Global Account Manager's roles in managing customer relationships in global business environments. To address this issue it will be necessary to gain evidence by asking questions related to the overarching research question:

¹ Since its inception to date over 100 companies have attended and contributed to the KAM Club

'What are the characteristics of the role of the Global Account in managing global business-to-business customer relationships?'

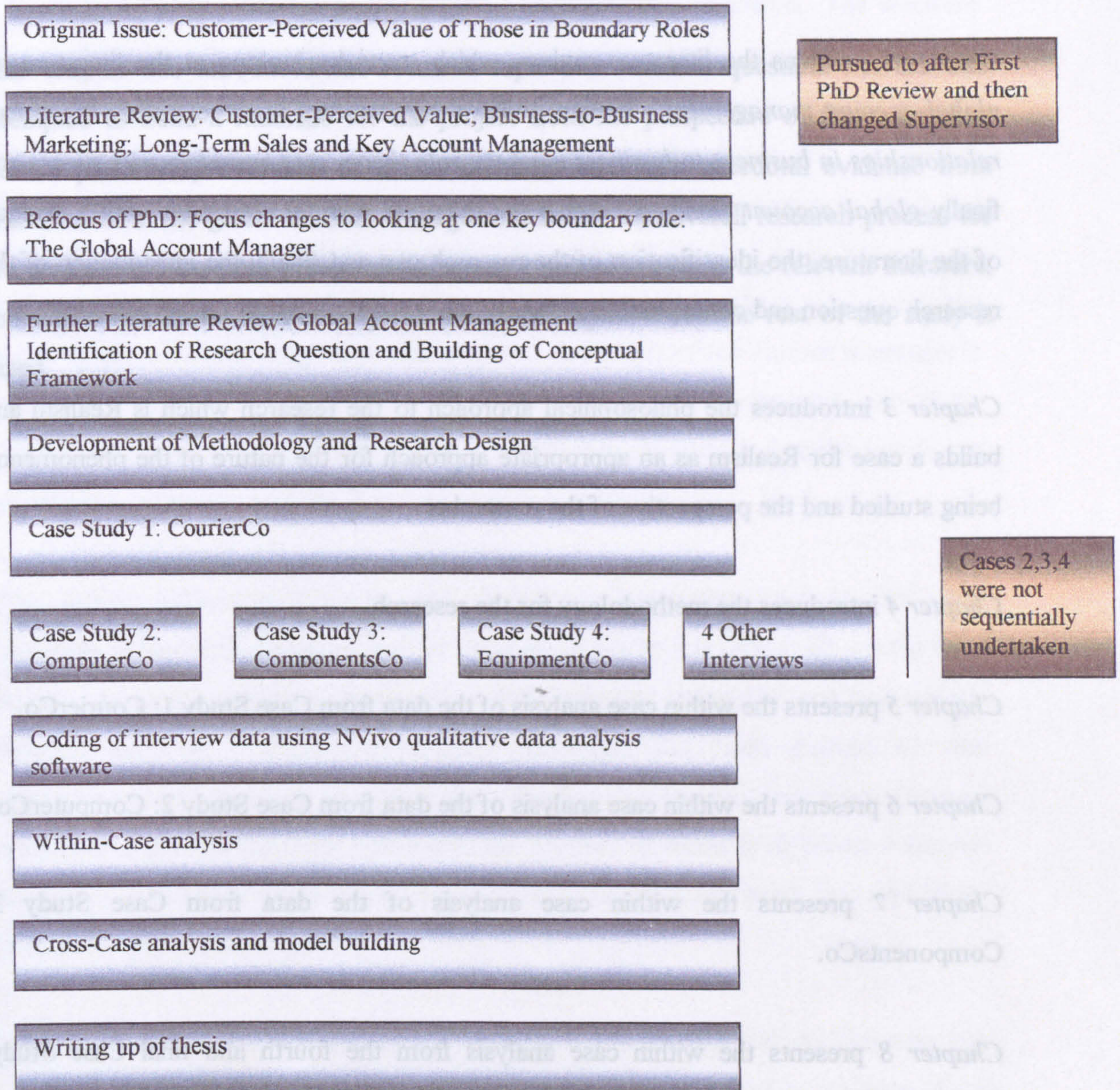
1.6 The PhD Project Process

The process of a PhD would appear to be a very individual process. This PhD started by originally focusing in the area of 'customer-perceived value of those in customer-facing boundary roles'. However, after pursuing this line of enquiry up to and including the First Review stage of the PhD, the student changed Supervisor. The research was then refocused on one particular boundary role, the Global Account Manager. The main reason for this was that it became evident that it would be difficult to look at the customer-perceived value of such boundary roles when the roles themselves had not been sufficiently academically researched and defined. This narrower focus was then pursued for the remainder of the project and it is this research that is reported in this thesis. Figure 1.1 represents the process for this research project.

1.7 Grants and Funding for the Research Project

The student started the research project as a Cranfield School of Management Director's Bursary student. At the same time, a successful individual application was made to the Economic and Social Research Council (ESRC) for funding of the research, which awarded the candidate an ESRC studentship for two years. The ESRC theme that encompassed the research project was the global business theme. In addition, the student won a research bursary of £1,000 from the Sales Research Trust (SRT) for presenting the best academic paper at the Fifth International Symposium on Sales and Account Management (see Holt and McDonald 2001a). This paper was subsequently published as an article in the Journal of Selling and Major Account Management (Holt and McDonald 2001b). This prize helped with research expenses and, in particular, with the costs of transcribing the interviews that formed the main data collection method.

Figure 1.1 The PhD Project Process



While the above process looks like a linear sequential process, in reality there was a lot of iteration between each stage, which involved, for example, revisiting the literature, revisiting the data and revisiting the case organisations.

1.8 Summary of Thesis Chapters

Chapter 1 has introduced the research topic and the PhD process.

Chapter 2 contains the literature review, which starts by looking at the literature on *global account management*. It then reviews the literature in three further key areas; *relationships in business-to-business markets, role theory and boundary role theory* and finally *global account manager roles*. The literature chapter concludes with a critique of the literature, the identification of the research gap and finally the introduction of the research question and conceptual framework.

Chapter 3 introduces the philosophical approach to the research which is Realism and builds a case for Realism as an appropriate approach for the nature of the phenomenon being studied and the perspective of the researcher.

Chapter 4 introduces the methodology for the research.

Chapter 5 presents the within case analysis of the data from Case Study 1: CourierCo.

Chapter 6 presents the within case analysis of the data from Case Study 2: ComputerCo.

Chapter 7 presents the within case analysis of the data from Case Study 3: ComponentsCo.

Chapter 8 presents the within case analysis from the fourth and final Case Study: EquipmentCo.

Chapter 9 presents the cross case analysis and the discussion of the findings including some additional findings. The theoretical model for the Role of the Global Account Manager is also presented.

Finally, *Chapter 10* contains the conclusions, the contribution of the study and its implications for practitioners. The limitations of the study are also discussed and opportunities are identified for further research.

1.9 Summary of Chapter 1

This chapter has introduced the research topic and research question. It has also attempted to build a rationale for the project from the perspective of the researcher, from a preliminary overview of extant literature and from anecdotal evidence from practitioners in the global account management field. The overall research process for the project has also been presented. Chapter 2 will now review the relevant literature, and which culminates in a conceptual framework upon which the rest of the study is based.

CHAPTER 2: THE LITERATURE REVIEW

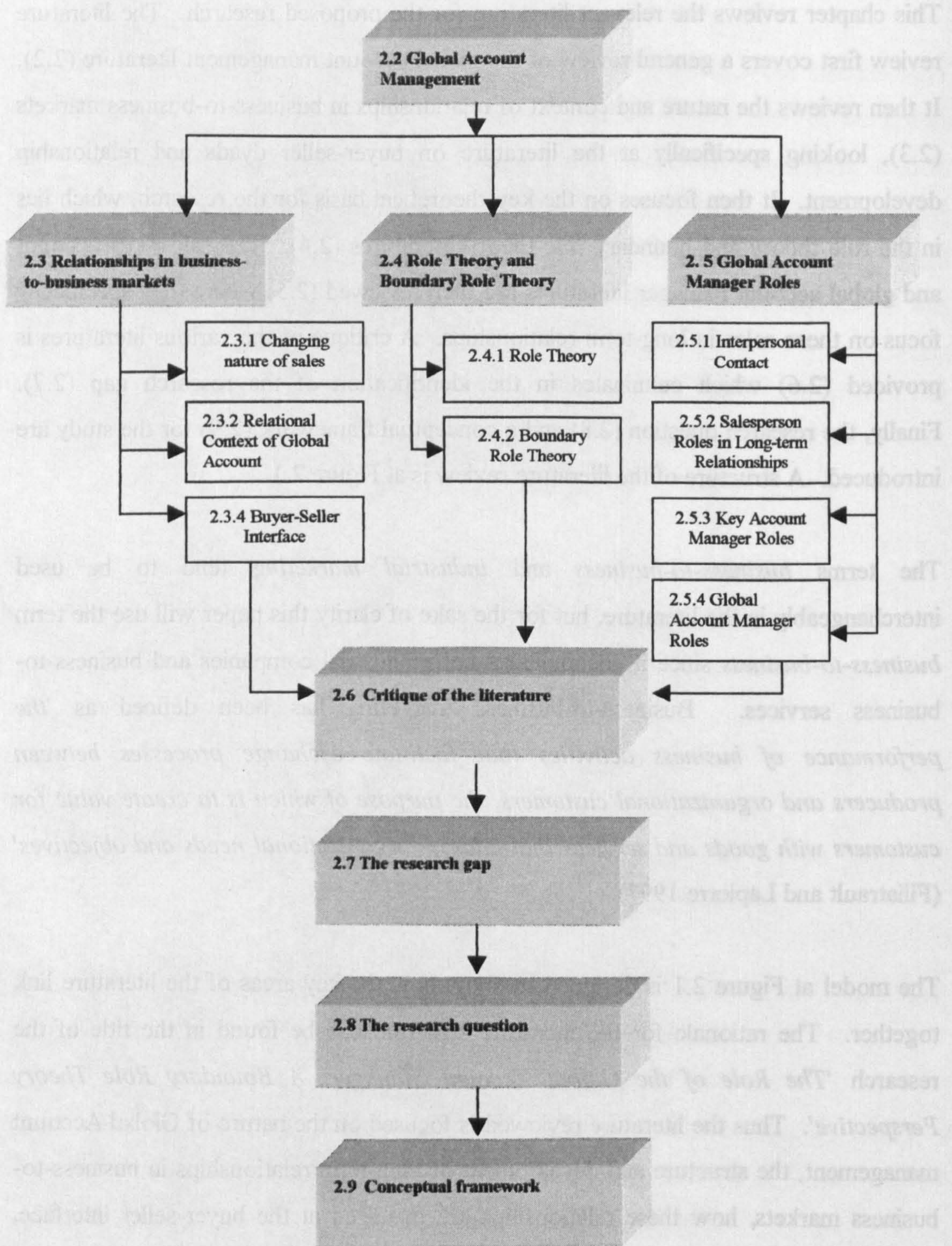
2.1 OVERVIEW AND STRUCTURE OF THE LITERATURE REVIEW

This chapter reviews the relevant literature for the proposed research. The literature review first covers a general review of the global account management literature (2.2). It then reviews the nature and context of relationships in business-to-business markets (2.3), looking specifically at the literature on buyer-seller dyads and relationship development. It then focuses on the key theoretical basis for the research, which lies in the role theory and boundary role theory literatures (2.4). The sales, key account and global account manager literatures are then reviewed (2.5) where they specifically focus on these roles in long-term relationships. A critique of the various literatures is provided (2.6) which culminates in the identification of the research gap (2.7). Finally, the research question (2.8) and a conceptual framework (2.9) for the study are introduced. A structure of the literature review is at Figure 2.1.

The terms *business-to-business* and *industrial marketing* tend to be used interchangeably in the literature, but for the sake of clarity this paper will use the term *business-to-business* since it encompasses both industrial companies and business-to-business services. Business-to-business marketing has been defined as '*the performance of business activities that facilitate exchange processes between producers and organizational customers, the purpose of which is to create value for customers with goods and services that address organizational needs and objectives*' (Filiatrault and Lapierre 1997).

The model at Figure 2.1 is designed to show how the key areas of the literature link together. The rationale for the literature structure can be found in the title of the research '*The Role of the Global Account Manager: A Boundary Role Theory Perspective*'. Thus the literature reviewed is focused on the nature of Global Account management, the structure and development of long-term relationships in business-to-business markets, how these relationships are managed at the buyer-seller interface, the key roles who manage the interface, and the key theories underpinning the research.

Figure 2.1 Literature Review Structure



2.2 GLOBAL ACCOUNT MANAGEMENT

Global Account Management (GAM) is a relatively new concept and has received little attention in the literature. It has emerged as a way of managing global customers that are of strategic importance to selling companies (Millman 1999a). It is described as:

'the process of co-ordinating and developing mutually beneficial long-term relationships with a select group of strategically important customers (accounts) operating in globalising industries'.

(Wilson et al. 2000)

'an organisational form and process in multinational companies by which the worldwide activities serving a given multinational customer are co-ordinated centrally by one person or team within the supplying company'.

(Montgomery and Yip 1999)

The globalisation of business is making GAM an increasingly important issue for many multinational companies who are operating in a global environment. It has also been argued in the journal of the Strategic Account Management Association (SAMA) that a sound global account management programme is a *'critical competitive weapon'*, and that it *'clearly represents the new frontier in strategic account management'* (Napolitano 1998). However, this is not simply a supplier-led concept as with many customer and relationship management initiatives. Global key accounts are also typically multinational customers who themselves have an expectation of being supplied and serviced worldwide in a consistent and co-ordinated way (Millman 1996). Multinational companies have begun to buy on a centralized or co-ordinated basis and in so doing have become *global customers* (Montgomery and Yip 1999). They seek suppliers who can treat them as a single entity and can provide consistent and seamless service across countries (Montgomery and Yip 1999). Suppliers are also recognising the extent to which they can grow with their global customers if they consistently succeed in meeting their customers' global expectations (McDonald et al. 2000). In response to these requirements, supplying organisations are starting to implement global account management. In so doing, many are creating Global Account Managers, who are tasked with managing the critical interface between sellers and buyers who are operating on a global basis.

A review of the existing literature reveals three main streams of research: that being undertaken in the US (Yip and Madsen 1996); and that being undertaken in Europe (e.g. Millman 1996, 1999a, 1999b; Millman and Wilson 1998,1999; Senn and Arnold 1999) and that being undertaken in both (Arnold et al. 2001; Birkinshaw et al. 1999; 2001).

The aspects of GAM covered thus far in the literature can be categorised as follows:

- *The emergence and concept of GAM* (Yip and Madsen 1996; Millman 1996; Millman, 1999b)
- *Development of GAM competencies and GAM roles* (Millman and Wilson 1999; Millman and Wilson 2000)
- *Implementing GAM* (Ronkainen and Menezes 1996; Senn 1999; Millman 1999b; Birkinshaw et al. 1999; 2001; Wilson 1999; Senn and Arnold 1999a, 1999b; Wong and Lau 1999; Montgomery and Yip 2000; Arnold et al. 2001)
- *Barriers to and problems with implementing GAM* (Millman and Wilson 1999; Arnold et al. 2001)
- *Organisational and cultural issues of GAM* (Millman and Wilson 1998; Millman 1999a, Galbraith 2001; Millman and Wilson 2001)
- *Extent of adoption of GAM* (Montgomery and Yip 1999)
- *Role and career development of global account managers* (Millman 1999b; Millman and Wilson 1999; Millman and Wilson 2000)

On one level, GAM can be seen as a more complex form of Key Account Management (KAM), and indeed, much of the literature puts it in this context (Montgomery and Yip 1999). However, the *global* dimension of GAM adds a number of fundamentally different aspects that are not so evident in KAM. These include, for example, cross-cultural issues (to do with e.g. people, systems, processes), the management of globally dispersed and cross-cultural teams, global versus local issues and conflict, global logistics competencies, the location of GAM managers and the management of global (and cross-cultural) communications.

While many of the questions surrounding the issue of GAM have been raised in the literature, little rigorous empirical research has yet been published. Research is clearly at an early stage and largely exploratory in nature. At the moment, it is posing more questions than answers. The logistics of carrying out research into GAM may also be proving an impediment for researchers in this area. Additionally, the complexity of the interrelationships and organisational structures evident in global organisations makes GAM a difficult area to research. However, given the increasing globalisation of business and the drive for companies to rationalise supply chains and form closer alliances and partnerships, understanding more about GAM is becoming a research imperative. In particular, understanding the roles that the Global Account Manager needs to perform is an area worthy of investigation. This is supported by Millman and Wilson (2000) who suggest that the *'role of the global account manager is an emerging one. The difficulties and complexities, as well as the strategic potential of the role are as yet poorly understood'*. This is the focus of this study.

Taking the view that GAM is an extension of both KAM and the salesperson's role in long-term relationships, the literatures relating to these roles are highly relevant to the proposed research. However, before this literature is reviewed, it is important to establish the context within which the concepts of KAM and GAM are embedded and to look at some of the theoretical underpinnings of the proposed conceptual framework.

2.3 RELATIONSHIPS IN BUSINESS-TO-BUSINESS MARKETS

2.3.1 The Changing Nature of Sales

In Chapter 1, the changing nature of sales was discussed against the changes in the focus of marketing management from a transactional to a relationship focus. It has been argued that the practice of personal selling and sales management is changing as a result of the increased attention on long-term, buyer-seller relationships (Biong and Selnes 1996; Wotruba 1996; McDonald, Millman and Rogers 1997; Weitz and Bradford 1999).

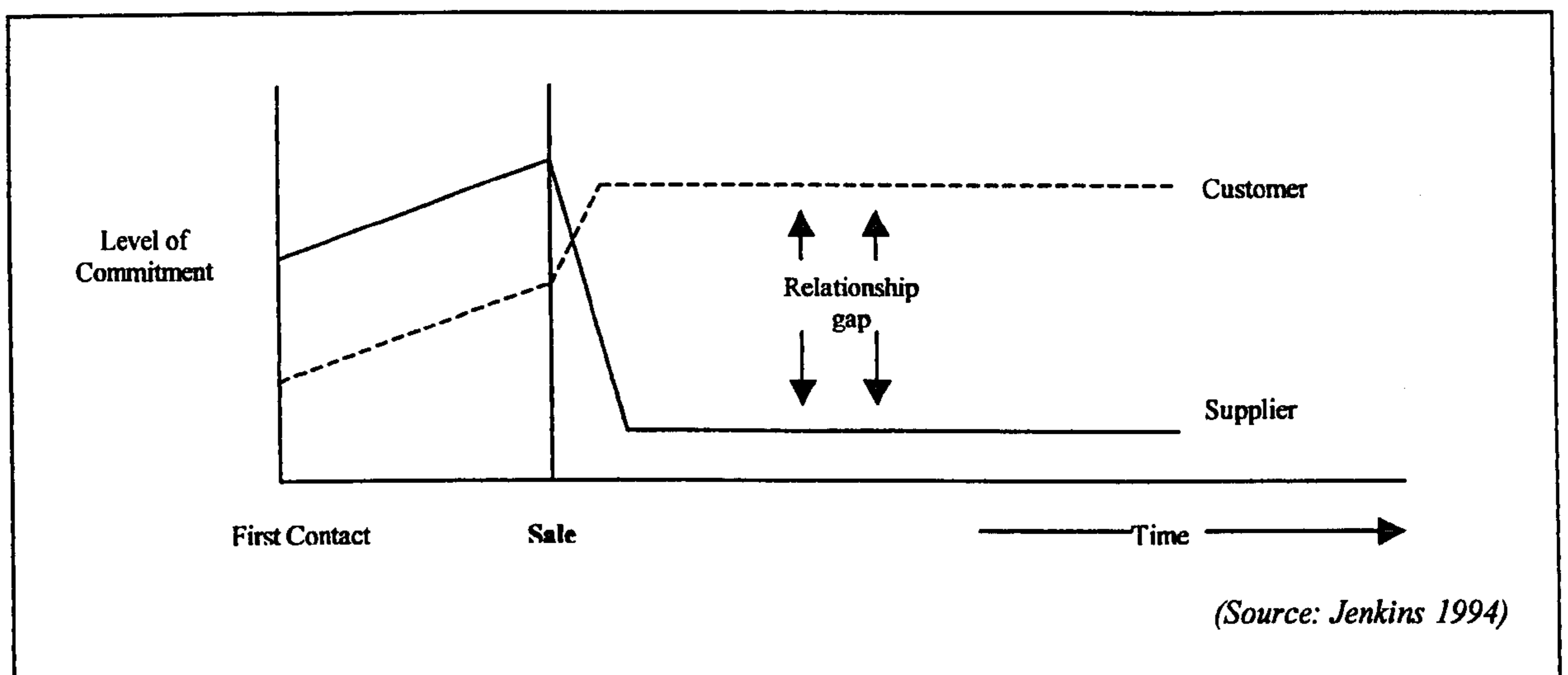
The role of salespeople and other boundary spanners is undergoing a change in response to this move from a transactional focus to a relationship focus (Jackson 1994; Wotruba 1996; Anderson 1996; Leigh and Marshall 2001) coupled with the economic imperative of customer retention. Historically the principles of personal selling have been viewed from a transaction orientation (Jackson 1994) with the salespeople committed to customer acquisition; the thrust has been to obtain the order and get the sale, backed up by reward systems designed to focus on revenue generation (Wotruba 1996). Salespeople have considered their roles fulfilled when the sale is made (Corcoran, Petersen, Baitch and Barrett 1995).

One of the largest barriers to relationship development is the organizational reward system which encourages salespeople to sell, not manage, relationships; while senior management talk about relationships, the relationship managers operate in a transactional mode (Wilson 1995). Revenue generation will need to change to satisfaction generation as the main responsibility of those in boundary roles, and selling as a persuasive act will diminish in importance as effort focuses on facilitating a relationship between the customer served and the company providing satisfaction (Wotruba 1996). Leading companies are beginning to measure salesperson success not only by units sold, but also by contribution to relationship quality through customer satisfaction (Biong and Selnes 1995; 1996). The most successful relationships are those where both the marketer and the customer abandon their

adversarial role behaviour in favour of some sort of partnership or alliance (Dodge and Fullerton 1997).

The *customer gap* model at Figure 2.2 shows the typical (historic) relationship of a buyer and seller over time. Levitt (1983) made the point that the relationship between a buyer and seller seldom ends when the sale is made. In managing the *gap*, the salesperson needs to move from a pre-purchase focus to a post-purchase and relationship maintenance focus as there is a need to maintain the relationships between purchase opportunities (Ford 1980). After-sales service is integral to the sale of many products as well as a way of maintaining customer contact and reducing the cognitive dissonance over the useful life of the product (Dodge and Fullerton 1997). Burger and Cann (1995) suggest that adopting a *post-purchase marketing strategy* at the *use/integration* stage of the relationship can lead to after-sales strategies that can have the effect of improving customer satisfaction with a possible payoff in terms of future sales and growth in service revenue.

Figure 2.2 Managing the Relationship Gap



Anderson and Weitz (1989) argue that improving the levels of trust in relationships can significantly *solidify* the ties between organisations and that one way of doing this is to appoint competent personnel to perform the boundary spanning (liaison) role. A proposition is put forward by Weitz and Jap (1995) that personal relationships and

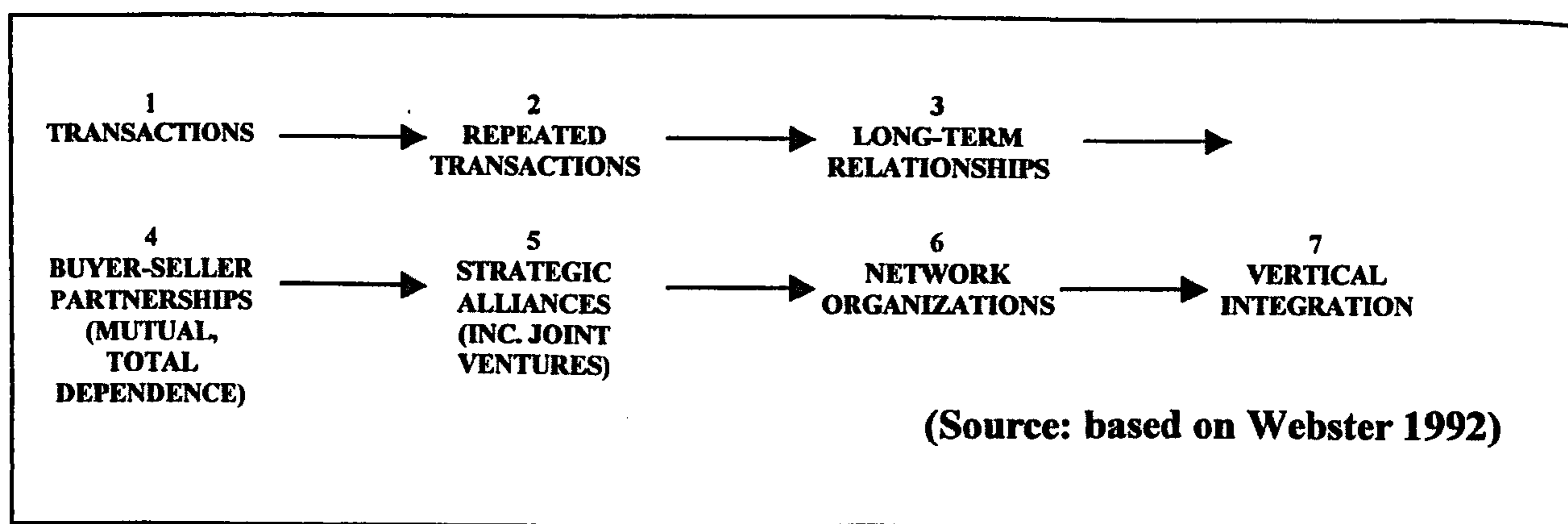
reputations between boundary-spanning members (of both parties) play an important role in facilitating and enhancing interorganisational exchange. Weitz and Jap (1995) argue that more work is needed that expands our understanding of how individual boundary-spanning members enhance or impede organisational outcomes.

2.3.2 The Relational Context of Global Account Management

Both KAM and GAM are concerned with the management of buyer-seller relationships. However, not all business relationships are the same and it is important to understand the different types if they are to be successfully managed. In further setting the context for the proposed research, the nature and form of relationships that can occur in a business-to-business environment are now explored.

Webster (1992) suggests a conceptual continuum of types of relationships from transactions at one end to fully-integrated hierarchical firms at the other (see Figure 2.3). Competitive forces in the global marketplace have forced many firms to move significantly along the continuum from arm's length relationships between suppliers and customers to much stronger partnerships characterized by much greater interdependence (Webster 1992).

Figure 2.3 The Range of Marketing Relationships



It is likely that as companies move along the Webster continuum so they will also move from largely competitive types of relationship to more co-operative and

collaborative types of relationship. Webster (1992) suggests that in business-to-business markets, while buyer-seller relationships have typically involved relatively long-term contractual commitments, even here the relationship is often arm's-length and adversarial and it is not until stage 4 of the continuum and above is reached that it progresses beyond an arms-length relationship and into co-operative and collaborative relationships.

Other models have been developed to explain in more detail the types of relationships and, in particular, the stages of relationship development (Ford 1980; Dwyer et al 1987 and Wilson 1995). While absolute parallels cannot be drawn between the various models, each has its contribution to make to understanding relational development (Millman and Wilson 1995). A comparison of these relational models which includes the Webster (1992) model, is in Table 2.1.

Millman and Wilson (1995) present a model of relational development that is specific to Key Account Management. This identifies six stages of relational development for KAM:

- *Pre-KAM*: customers are not likely to be key accounts and selling strategies are likely to be concerned with making basic product or service offerings available
- *Early-KAM*: exploring opportunities for closer collaboration with selling focused on building trust through consistent performance and open communications
- *Mid-KAM*: increase in the levels of trust and the range of problems that the relationship addresses. Number of cross-boundary contacts will also increase with the sales person taking a less central role
- *Partnership-KAM*: this is a mature stage of key account development, with the focus of activity on joint problem resolution
- *Synergistic-KAM*: this goes beyond partnership, where the two organisations see themselves as part of a larger entity creating joint value (synergy) in the marketplace
- *Uncoupling-KAM*: dissolution of the KAM relationship

Table 2.1 A Comparison of Relational Models

Webster 1992	Ford 1980	Dwyer et al 1987	Wilson 1995	Millman and Wilson 1995	McDonald and Woodburn 1999
Transactions	Pre-relationship	Awareness	Partner Selection	Pre-KAM	Exploratory
Repeated transactions	Early Stage	Exploration	Defining the Purpose	Early-KAM	Basic
Long-term Relationships	Development Stage	Expansion	Setting the Boundaries	Mid-KAM	Co-operative
Buyer-seller Partnerships	Long-term Stage	Commitment	Creating Relationship Value	Partnership-KAM	Interdependent
Strategic Alliances	Final Stage	Institutionalisation	Maintaining the Relationship	Synergistic-KAM	Integrated
				Uncoupling-KAM	Disintegrating

Based on Millman and Wilson (1995)

McDonald and Woodburn (1999) took the Millman and Wilson (1995) model and following an empirical research study, redefined the labels for each stage. This was an attempt to define the stages in terms that would reflect the perspective of either the selling company or the buying company. They allow both parties to the dyad to use common terminology when discussing the same entity ie the relationship between them (McDonald and Woodburn 1999). They define the stages as:

- *Exploratory*: searching and matching activity often before serious trading commences;
- *Basic*: 'no frills', emphasis on efficient transactions;
- *Co-operative*: more than strictly transactional, positive but not close;
- *Interdependent*: recognition of mutual advantage, frequent contact and dialogue;
- *Integrated*: rare type, joint activity, cross-boundary teams, development of trust;
- *Disintegrating*: transitional stage of regression or exit, can start from any of the previous levels.

One of the problems with relational development models is that there is a tendency to take the view that it is only those relationships in the later stages of the models that are of worth to the organisation. While these models are helpful in understanding the different types of relationships, it is likely that organisations will have a large range or portfolio of relationships spanning the entire spectrum of relationships with the majority being arms-length type of relationships (Lambert et al 1996). These arm's-length relationships may form a core part of a company's business and these customers may not want a closer, co-operative relationship (McDonald and Rogers 1998).

Another problem with the models is that an assumption is often made that organisations need to develop customers and relationships *along* or *up* the spectrum. However, there is increasing recognition that not all relationships will follow a *process*, e.g. it is not always possible and, more importantly, desirable for every customer to be moved along the process. Equally, customers may thwart any approaches from the supplier to change the nature of the relationship. Not all relationships, therefore, are appropriate for development (McDonald and Rogers 1998).

Consequently, not all types of relationship will, therefore, be appropriate for a KAM or GAM approach (McDonald and Rogers 1998) as evidenced in the empirical study by McDonald and Woodburn (1999). It is not until, for example, the *interdependent* and *integrated* stages of the McDonald and Woodburn (1999) model, that KAM, and thus arguably GAM need to be fully operational at a strategic level. At the *exploratory*, *basic* and *co-operative* levels of the KAM model, it is likely that a more traditional sales approach would still be more appropriate (McDonald and Rogers 1998) and the organisation can use traditional sales roles to meet customer requirements. However, at the *interdependent* and *integrated* levels, it is argued that the roles required of KAMs are likely to be significantly different to the traditional salesperson's role in a number of areas (Millman and Wilson 1995; Millman 1996; McDonald, Millman and Rogers 1996, 1997; McDonald and Woodburn 1999). An assumption can be made that the same would hold true for GAMs. This research will thus focus on Global Account Manager roles as they relate to the later relational stages as described in McDonald and Woodburn (1999).

2.3.3 The Dyadic Interface

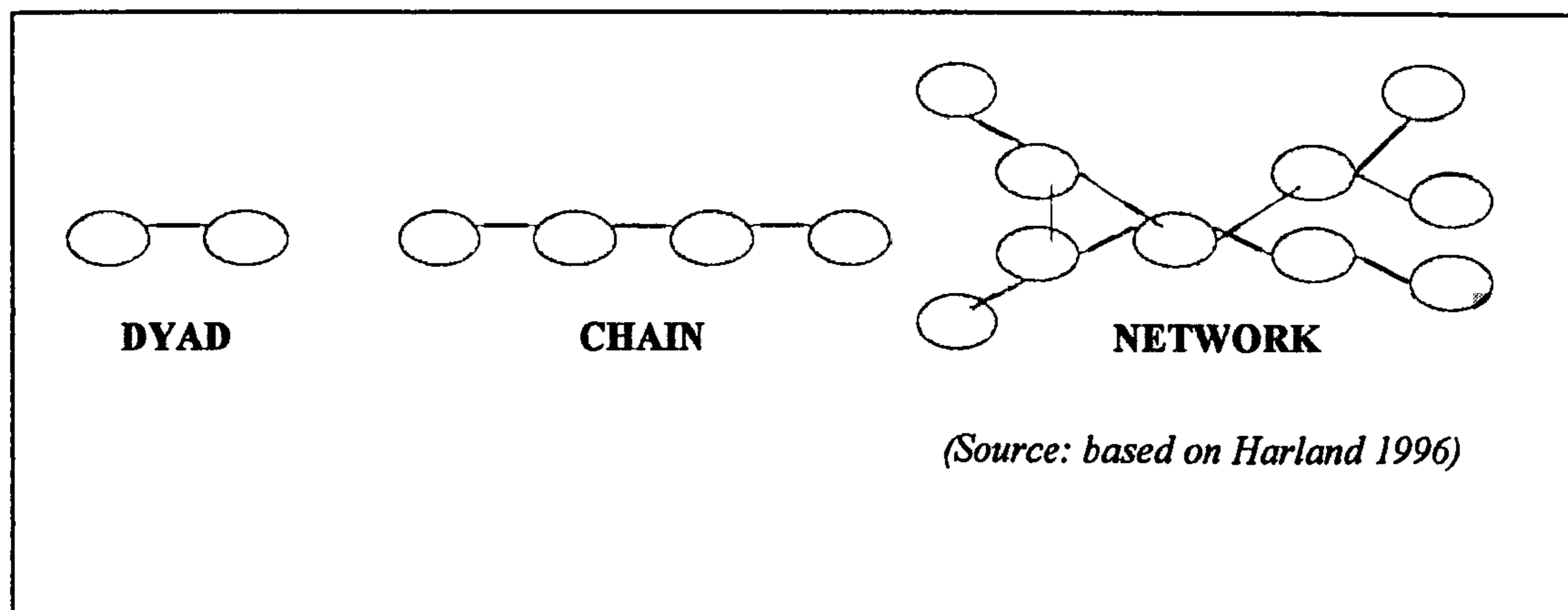
A Global Account Manager operates at the interface between the buying and selling company. Understanding the nature of the buyer-seller interface between organisations is important in business-to-business markets for three reasons. Firstly, there are generally several people involved in the relationship on both sides of the interface bringing a complexity that is not often found in consumer marketing. Secondly, the nature of business-to-business products and services, can be complex and often project-based, so that the purchase, installation and usage can all take a long time. Thirdly, the complexity of product and interface goes some way to explaining why those in boundary roles (see below) are so important in the management of the interface and the relationships between organisations. For GAM, the interorganisational interface is likely to be highly complex.

It is possible to study buyer-seller relationships in a *dyadic* context (e.g. Anderson and Weitz 1989; Moorman et al 1992, Millman and Wilson 1996), as part of a *chain* (Harland 1996) or as part of a *network* (Anderson et al 1994; Holmlund and Törnroos 1997) as shown in Figure 2.4 based on Harland (1996). This research project which is focusing on the buyer-seller relationship at the buyer-seller interface, will take a dyadic context since it is necessary to look at both parties in the relationship as a dyad (Wilson 1978). This is supported by the dyadic paradigm theoretical approach proposed by Bonoma, Bagozzi and Zaltman (1978). The dyadic relationship is the basic irreducible building block of interfirm relationships (Mummalaneni 1995). It can be used as the basis for studying a swathe of marketing phenomena ranging from salesperson-purchasing agent interactions to interfirm relationships and strategic alliances (Wilson and Mummalaneni 1986).

However, within the dyad, the buyer-seller interface is often represented as a *network*, since '*commonly, several individuals from different functional areas, at different levels in the hierarchy and fulfilling different roles become involved in inter-company interactions*' (Håkansson 1982:20). While the buyer-salesperson interaction may lie at the heart of the relationship, other key players are also involved, making complex interactions between people (Webster and Wind 1972). The KAM is often represented

as managing both internal and external networks (Pardo 1994). To explain the behaviour of the buyer-seller dyad, it is suggested that it is first necessary to know the *decision dyad* with respect to the task at hand (Wilson 1978). The buying centre literature (Wind 1978a; Wind 1978b; Gultinan 1978; Bagozzi 1978; Johnston and Bonoma 1981) has recognised this from the buyer's perspective for some time (e.g. Robinson, Farris and Wind 1967). Webster and Wind (1972) describe the roles involved on the purchasing side as the *user, influencer, decider, buyer* and *gatekeeper*.

Figure 2.4 Different contexts of buyer-seller relationships

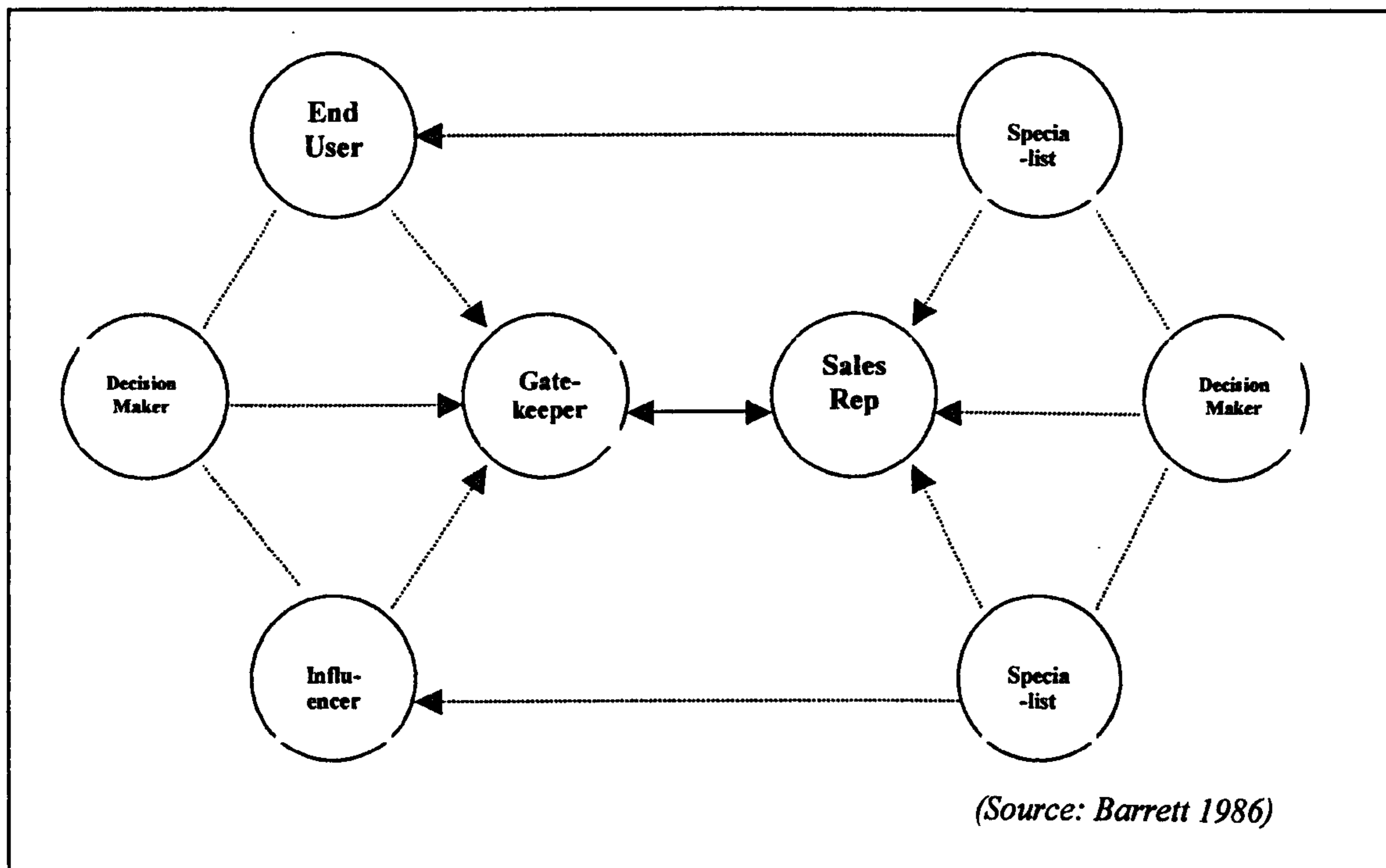


More recently, it has been recognised, particularly with the emergence of KAM, that the selling organisation has a similar structure, sometimes referred to as the *selling centre* (Hutt, Johnston and Ronchetto 1985, Spekman and Johnston 1986; Smith and Barclay 1993). A selling centre is defined as *interfunctional decision units of selling organisation members who are involved in initiating and maintaining exchange relationships with industrial customers*. Barrett (1986) illustrated the extension of the buying centre model to include the selling side of the relationship as shown in Figure 2.5.

While the model could now be criticised for not showing the communication channels as a two-way process, it does clearly represent the two sides of the dyadic relationships; the buying centre and the selling centre. All the roles within the

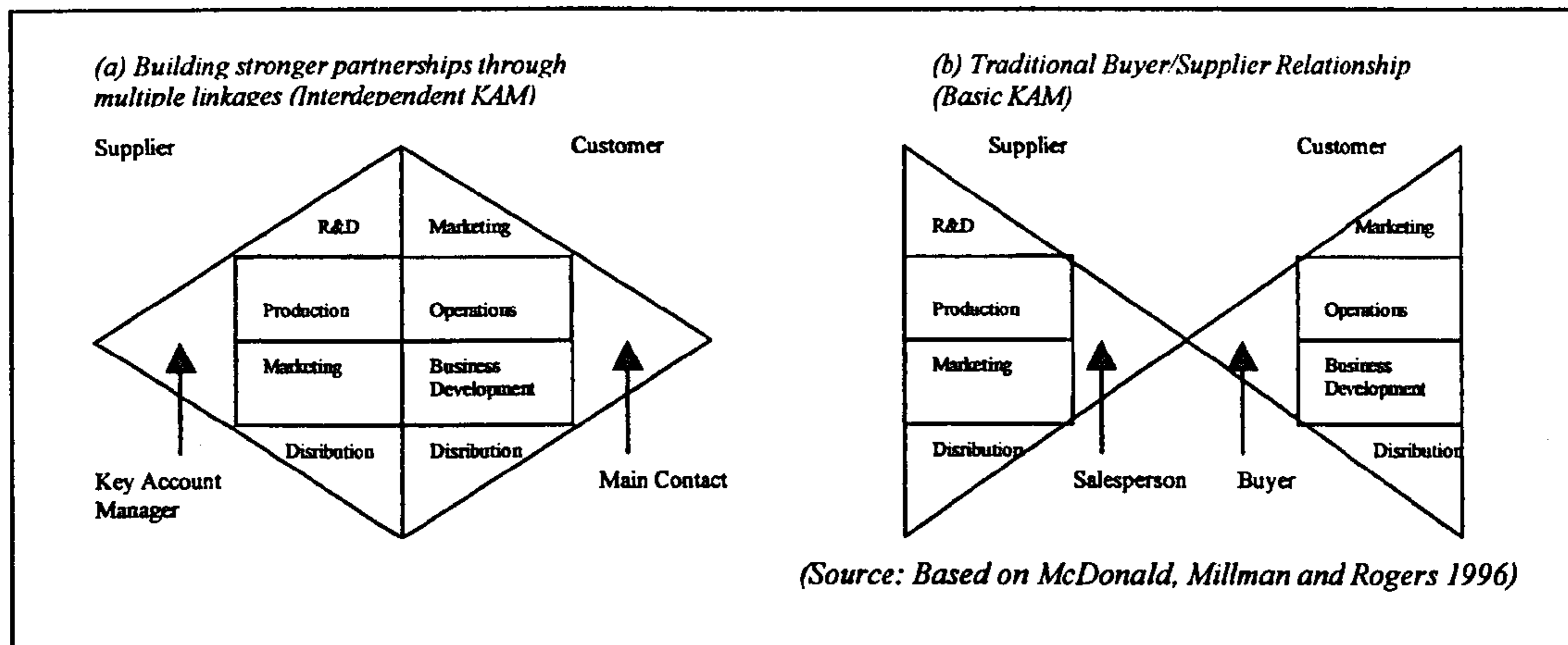
relationship will be influential to a greater or lesser extent on decision-making within the relationship (Webster and Wind 1972), and an assumption can be made that they will also be influential, for example, on information exchange, on the development of the relationship, on how long the relationship lasts and when, if ever, the relationship is dissolved.

Figure 2.5 The Buyer-Seller Interface Relationship



The notion of multiple level, complex relationships at the buyer-seller interface has been explored most recently both within the relationship marketing literature (Clark and Payne 1995) and the key account management literature (McDonald, Millman, and Rogers 1996; McDonald, Millman and Rogers 1997, McDonald and Rogers 1998) within the context of a shift that is underway from the traditional adversarial, confrontational buyer-seller relationship to 'team-based relationship marketing'. This involves building as many multiple links as possible between the customer and the supplier (see Figure 2.6). This approach can either be represented by functions (Clark and Payne 1995) or roles (Holt 1996).

Figure 2.6: Team-based relationship marketing

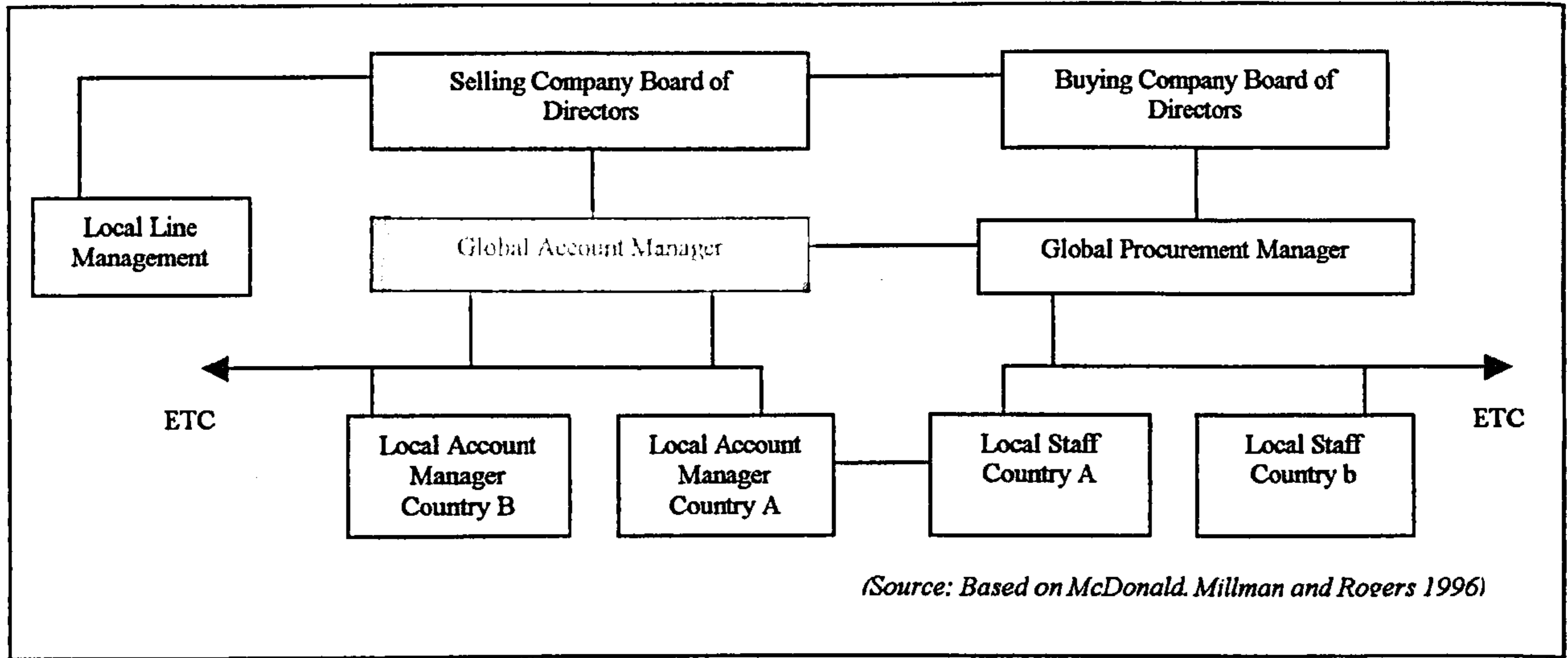


One result of building stronger relationships has been the emergence of account teams as a way of managing KAM, which could equally apply to GAM.

This shift in the nature and structure of the inter-organisational interface mirrors the shift from transactional to relationship marketing with an assumption that managing the interface to achieve long-term relationships between customers and suppliers is the physical manifestation of relationship marketing at the operational/implementation level in business-to-business markets (Humphreys and Williams 1996). While all the members of the *selling centre* are influential in the relationship, for business-to-business selling companies, the people in boundary roles are a major component of the firm's marketing strategy (Jackson 1994) and it is they who have the prime responsibility for managing the interface with the customer. The interaction process is likely to be orchestrated and maintained by the salesperson who is the *linchpin* who keeps the buying process moving forward toward resolution and nurtures the relationship after the sale (Spekman and Johnston 1986). Wotruba (1996) supports this view; *'often a vendor's intentions to establish long-term relationships are communicated primarily through and implemented by their salespeople who are a key element in the successful (or not) implementation of this market orientation'*.

Based on empirical research, McDonald, Millman and Rogers (1996) give an example of the type of interface that can apply for Global Account Management (see Figure 2.7) which supports the conceptual models of the buyer-seller interface.

Figure 2.7 Global Account Management: An Example



In summary, what these models show is that in researching KAM or GAM at the level of the buyer-seller interface, it is likely that the following will need to apply:

- It will require research to take place on both sides of the dyad; taking the view of just one party (customer perspective or supplier perspective) is insufficient. This view is backed up by previous research e.g. McDonald, Millman and Wilson 1996 and has been recognised as a weakness in previous research on global account management research (Birkinshaw et al. 2001).
- When studying the Global Account Manager roles, it will not be sufficient to research just the Global Account Manager. The Global Account Manager is managing and operating within a network of *actors* (Iacobucci 1996). It is likely that the views of all these actors will need to be considered in order to gain a sufficient understanding of the role. Therefore, the views of managers, customers and colleagues will be important.

Both these factors are supported theoretically by reference to *role theory* and *boundary role theory*.

2.4 ROLE THEORY AND BOUNDARY ROLE THEORY

2.4.1 Role Theory

The concept of role provides a theoretical context for evidence on managerial jobs and behaviour (Fondas and Stewart, 1990). Role theory has been used for some time in the management behaviour literature to better understand the nature of management jobs and behaviour (Kahn et al., 1964; Hodgeson et al., 1965; Katz and Kahn, 1978; Tsui, 1984a, 1984b). Fondas and Stewart (1990) referring to work by Goffman (1961) and Sarbin (1968) describe role theory as a promising theoretical framework for the analysis of any set of persons whose common life situation is worth looking at sociologically and particularly for the analysis of occupational and quasi-occupational positions. *'An emphasis on social positions, particularly those in complex organisations, makes role theory especially suited for the study of individuals in managerial jobs'* (Fondas and Stewart, 1990). In particular, it can help to provide a framework for data collection.

Another aspect of role theory that is useful is that role analysis tends to concern itself with the behaviours of categories of persons, i.e. those in a particular occupational position. It suggests that researchers search for consistent patterns of behaviour characteristic of those occupying the social position *manager* (or in this case, *global account manager*) in order to identify what makes their jobs *managerial* (or *global account managerial*) in nature (Fondas and Stewart, 1990).

Role theory explains how each focal position in an organisational structure is presented with a set of *role expectations* which are prescribed by multiple *role senders* (Katz and Kahn 1978). In looking at the role of *relationship managers*, Christopher et al (1999) explain how in a relationship manager's role set, there are at least three primary groups of role senders; superiors, customers and other members of the customer-interfacing team. Customer-interfacing team members typically represent different functions in the organisation.

'Each category of role sender may be considered as a stakeholder group with whom the focal manager has some level of interdependence due to authority structure,

workflow or resource exchange relationships' (Christopher et al 1999). Thus role theory demands that the tasks of a Key Account Manager or Global Account Manager have to be seen both in relation to role responsibilities and in relation to the network of relationships in their environment.

2.4.2 Boundary Role Theory

Earlier literature on boundary roles also underpins the above approaches. A *boundary position* is defined by Kahn et al (1964) as one which requires extensive interaction with persons who occupy positions in another system, either another unit within the same organisation or another organisation altogether (Organ and Greene 1972).

A boundary spanning (or agent) role in business-to-business organisations is defined as those people who operate at the periphery of an organisation (Singh and Rhoads 1991) and who constitute the interorganisational linkages (Organ 1971) e.g. salespeople and purchasers. Organ (1971) argues that these roles are strategically important as *linking pins* for several reasons:

- it is through their behaviour that the organisation adapts (or fails to adapt) to changes in the environment
- it is through reports of the boundary spanners that other organisation members acquire their knowledge, perceptions and evaluations of the organisation's environments
- it is through the vigilance of these roles that the organisation is able to monitor and screen important happenings in the environment
- they function as *sensory organs* for the organisation

Spekman (1979) extended Organ's largely one-sided view to include the *role sender* aspect of the boundary spanner; an influence agent attempting to influence the decisions and behaviours of those individuals with whom he/she interacts, both inter-

organisationally and within his/her organisation. This extended role fits well with the dyadic interface models discussed above. Schneider (1994) refers to these roles as constituting the '*boundary tier*' between their own organisation (the '*co-ordination tier*'), and the '*customer tier*'. Leaders of organisations should have considerable interest in the type of person who is best suited for these roles (Organ 1971).

The key boundary roles within the *selling centre* in business-to-business markets are salespeople and *major, national, key* or *global* account managers. However, it is not just salespeople and key account managers who interface with the customer. Increasingly the *inside sales force*, e.g. customer services (ordertakers, technical service, help desks, after-sales service), is influential in buyer-seller relationships (Boyle 1996). Boyle suggests this is due to emerging technologies and the need to find more economical ways of managing customer relationships in view of the investment required in a field sales force. Anderson and Narus (1986) also support this view.

The notion of the *selling team* (Smith and Barclay) also suggests that people other than the salespeople and key account managers will be involved with the customer relationship. Selling teams are often made up of people from other functional areas, such as finance, operations, marketing and research and development. All these inside roles could also be viewed, with respect to KAM and GAM as part complementary and part supplementary to the Key Account Manager or Global Account Manager. They may also form part of the Key Account or Global Account *team* where organisations have structured KAM and GAM in this way. Thus those in boundary roles are likely to interface with a number of different key people both within their own organisation and within the customer organisation. This is congruent with role theory.

Boundary role *ambiguity* among sales and marketing professionals has also received attention in the literature (e.g. Singh and Rhoads 1991; Singh 1993) and serves to reinforce the view that those in boundary roles have to manage a number of different expectations which includes those of managers, co-workers and customers.

2.5 GLOBAL ACCOUNT MANAGER ROLES

There are three distinct areas of research that have emerged during the 1990s that look at sales type roles in long-term relationships. The first of these areas is that described broadly as the *salesperson's role in long-term relationships*. The second, more specialised area, is that of *Key Account Management*. The third area is that of *Global Account Management*. Most of the work has been of a conceptual nature, with little empirical research being presented. Also, where the roles are discussed, they tend to be presented using broad general terms that do little to increase our understanding of what these people do. There is also a tendency to use terms that describe the roles in terms of their relationship with the customer, often neglecting the internal interfaces that could be a major part of these individual's role requirement. Anecdotal evidence from the Cranfield KAM Club also suggests that a large part of e.g. the Key Account Manager's time is spent on activities such as portfolio analysis of key accounts, analysing key account information and key account planning (both short and long term). This aspect of the role is also neglected in the literature.

However, in order to build a preliminary conceptual framework, such roles as have been identified in the literature are now examined.

2.5.1 The Importance of Personal Contact

Before discussing the specific literature on KAM and GAM roles, it is worth exploring the personal contact model promulgated by Cunningham and Turnbull (1982). In managing the buyer-seller interface, interpersonal contact is of prime importance. Personal contact is described by Cunningham and Turnbull (1982) as the means by which inter-company relationships are established and maintained. Looking at personal contact from the dyadic perspective (based on a case study approach) they suggest that the roles of the personal interactions at the buyer-seller interface are:

- **Information exchange role:** encompasses the transfer of '*hard*' data e.g. price, specifications and terms of contract and '*soft*' information e.g. company news

- **Assessment role:** assessment of a supplier's competence or a customer's suitability frequently involves personal judgements as well as objective facts; these judgments are improved through interacting with the other party in both formal and informal situations.
- **Negotiation and adaptation role:** negotiation will generally take place over a wide range of topics with personal contacts being the normal means of persuasion and negotiation. Similarly, adaptations to products and services are discussed
- **Crisis insurance role:** contacts are often formed as a form of crisis insurance on both sides of the relationship – when a major problem or crisis occurs these contacts are utilised often as a means of obtaining rapid action
- **Social role:** when people meet other people whom they like, a social relationship may develop which may continue even if the contact is moved to another function within the organisation
- **Ego-enhancement role:** a second form of social contact occurs when an individual deliberately establishes contact with senior people in the supplier or buyer organisation because they believe it will enhance their status in their own organisation.

This model is helpful as it could form the basis for the types of roles that Key Account Managers and Global Account Managers need to adopt if they are to successfully manage long-term relationships at buyer-seller interface.

2.5.2 Salesperson Roles in Long-term Relationships

The sales literature is vast and the majority of it is concerned with salesforce reward systems, salesforce management, motivation of the salesforce, role ambiguity, stress and salesforce performance and salesforce outcomes. It is not the intention to review this vast body of literature here. However, there is a body of research in the sales literature domain that is pertinent to this study. As already inferred, interpersonal relationships are extremely important in ensuring the continuity of the dyad and stable dyads are characterized by cordial interpersonal relationships (Anderson and Weitz

1989). However, a few studies in business-to-business markets (Legace, Dahlstrom and Gassenheimer 1991; Biong and Selnes 1995; Corcoran et al 1995; Wotruba 1996; Leuthesser 1997) and services markets (Crosby, Evans and Cowles 1990) have attempted to identify the roles, skills and behaviours required by salespeople in relational situations as opposed to transactional situations.

Biong and Selnes (1995) identified several role descriptions of salesperson (or boundary role) behaviours and skills based on a review of the literature on salesforce management and interorganisational relationships; these were:

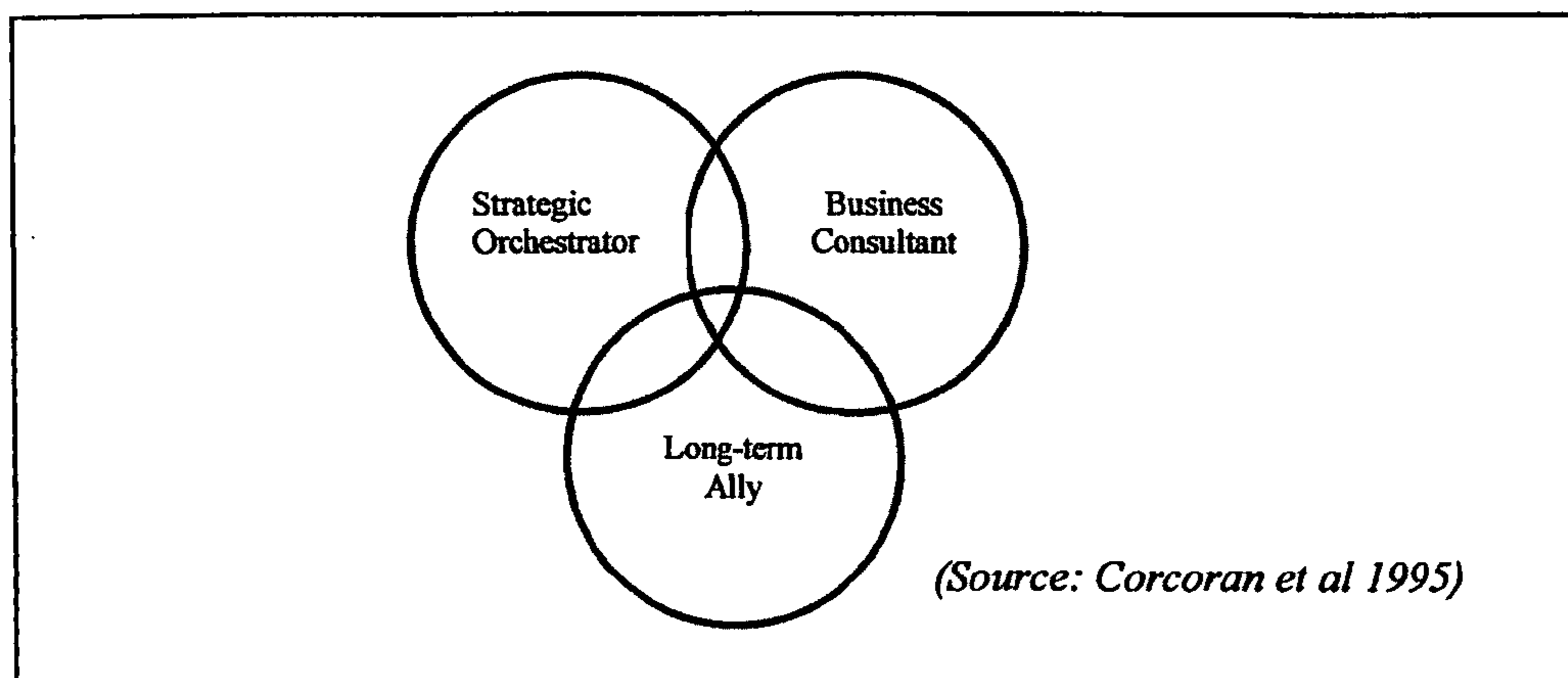
- *Communication*: the exchange of information between supplier and customer – a salesperson may mediate communication between the customer and supplier and as the parties move closer and become more dependent, open communication in the form of exchange of strategic information increases in importance. Several studies suggest the exchange of information is an important part of both traditional industrial selling and relational selling (Cunningham and Turnbull 1982; Håkansson 1982; Anderson and Weitz 1989; Dwyer et al 1987).
- *Conflict handling*: within a buyer-supplier relationship, conflict as a consequence of different perceptions of goals and roles is as predictable as misperceptions and incorrect deliveries (Dwyer et al 1987). Anderson and Narus (1990) suggest boundary personnel should be trained in conflict resolution to solve conflicts before they reach manifest state. Relationship marketing demands the establishment of mutually accepted norms of redress (Dwyer et al 1987) so conflict handling is suggested to be an important skill in relational selling.
- *Personal similarity*: personal similarity is reflected in the nature of the interpersonal contact between the salesperson and the members of the customer's buying centre. Relationship failures can be tracked back to interpersonal problems. The rationale for expected importance of personal similarity is that it makes solving disagreements easier and reduces

communication barriers. Personal similarity is also expected to contribute to the creation of trust, thus contributing to the relationship as a risk-reducing mechanism.

- *Sales aggressiveness*: some aggressive behaviours could be effective to make an immediate sale, but may weaken the long-term relationship. In a relationship with a high degree of dependence on the supplier, an aggressive selling behaviour can be perceived as a misuse of position, causing an even more negative effect on the customer's willingness to continue the collaboration.
- *Control*: defined as the salesperson's attempt to control the business relationship. Salespeople who exert high levels of control frequently direct the interaction toward an outcome that is more compatible with the supplier's needs than the customer's needs. In a continuous relationship it is probably more effective for the salesperson to emphasize customer needs instead of controlling the process in favour of the seller and the immediate sale. Control can harm the relationship because it may dilute the sense of goal congruence which will probably become even more important as the relationship becomes closer.

Corcoran et al (1995) compare 'traditional selling' with 'consultative selling' and suggest there are three key roles for salespeople as shown in Figure 2.8.

Figure 2.8 Three Roles of Consultative Selling



Based on survey data, Corcoran et al (1995) define the three roles as:

- *Strategic Orchestrator Role*
 - works to harness all of his or her company's resources for the customer
 - builds co-operation
 - involves colleagues at all levels of the organisation
 - adopts a problem-solving approach to production, delivery implementation and service concerns
 - weighs the costs and benefits of various value-adding activities and makes the customer aware of them in a way that builds the business relationship

- *Business Consultant Role*
 - uses internal and external resources to gain an understanding of the customer's business and marketplace
 - thoroughly educates the customer about products as well as how they compare to the competitor's offerings
 - has well thought out plans for each account/territory
 - approaches problem-solving and decision-making with creativity and an understanding of the 'big picture'

- *Long-term Ally Role*
 - acts as a business partner
 - works to support the customer even when there is no immediate prospect for a sale
 - positions products and services honestly and turns down business that isn't in the customer's long-term interest
 - 'goes to bat' for the customer whenever necessary and helps customers to carry out fact-finding missions with their own companies
 - shows pride in their company, products and services

Wotruba (1996) takes a different perspective and looks conceptually at the role that may be required now and in the future in terms of the sales position, the sales process and the skills required of the sales people as shown in Table 2.2. Perhaps the closest position to the one outlined in today's sales organisation is the national account manager (Wotruba 1996).

Table 2.2 The Future Role of Sales

<i>Sales Position</i>	<p><i>The salesperson's position becomes:</i></p> <ul style="list-style-type: none"> • the manager of customer value • a customer advocate • a resource to policy and strategy-makers in their own company
<i>Sales Process</i>	<p><i>The salesperson must in the sales process:</i></p> <ul style="list-style-type: none"> • establish a relationship of trust and mutual benefit • actively obtain information from the customer • be the co-ordinator responsible to the customer for all exchanges in the relationship with that customer
<i>Sales Person</i>	<p><i>The salesperson must:</i></p> <ul style="list-style-type: none"> • be able to relate to a wide variety of persons in both organisations • act as an entrepreneur in terms of innovation, risk-taking and proactiveness • have knowledge of the customer, co-ordination skills, analytical ability, top management perspective, ethical sensitivity, understanding of

	competitors <ul style="list-style-type: none"> • be self-managed, self-directed and self-motivated
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An empirical study by Leuthesser (1997) found there were three relational behaviours that were important for the supplier's boundary spanners to adopt; *initiating* (initiate deliberate efforts to understand their customers' business conditions and search for ways to help customers more effectively), *signalling* (signal clearly, and in a timely way, any changes that might affect their customers' operations or markets, and *disclosing* (disclosing information about themselves that implies trust in the buyer. These are all arguably dimensions of the 'communication' role suggested by Biong and Selnes (1995).

The sales role in long-term relationships is arguably one of the *relationship manager*. There are some strong links between the models for the roles of the salespeople in long-term relationships and the personal contact model suggested by Cunningham and Turnbull. The key account management role discussed below has many similarities to the expanded role of the salesperson suggested by Wotruba (1996).

2.5.3 Key Account Manager Roles

A key account is a '*customer in a business-to-business market identified by selling companies as of strategic importance*' (Millman and Wilson 1995) while account management is defined as '*an approach adopted by selling companies aimed at building a portfolio of loyal accounts by offering them a product/service package tailored to individual needs. To co-ordinate day-to-day interaction under the umbrella of a long-term relationship, selling companies typically form teams headed up by the key account manager*' (Millman 1996).

From the key account literature, it is possible to identify the following conceptual roles which Millman and Wilson (1995) suggest are adopted by key account managers:

- Boundary spanning role of the ‘relationship builder’ where the incumbent is simultaneously:
 - negotiator
 - consultant
 - interpreter of customer needs/values
 - mediator
 - customer’s friend
 - information broker
 - facilitator of multi-level, multi-functional exchange processes
 - co-ordinator of and tailoring the seller’s total offering to key accounts
 - promotion of the KAM concept within their own company
 - manager responsible for sales/profit growth of one or more key accounts, consistent with the business objectives of the seller’s total portfolio of key accounts

There are a number of strong similarities between these roles and those discussed in the literature for sales roles in long-term relationships (see Biong and Selnes 1995; Corcoran et al 1995 and Wotruba 1996).

Colletti and Turbridy (1987) described the functional skill requirements of a major account manager in terms of *analytic and bargaining skills, problem-solving and presentation skills, interpersonal relationship skills, and research and account profiling skills*. They found that the three key reasons for companies adopting a major account management approach were to *enhance working relationships with customers, protect and retain large customers and increase sales to current customers*.

2.5.4 Global Account Manager Roles

Building on the KAM work, Millman (1996) presented a tentative list of global account manager roles/responsibilities: *co-ordination; key account planning; external relationship management; internal relationship management; sales and profit responsibility; negotiation; multi-cultural teamwork*.

The literature in paragraphs 2.5.3 and 2.5.4 is summarised in Table 2.3 using the 'personal interaction roles' as the basis for categorising the other literature.

Table 2.3 Summary of Roles From the Literature

Personal Interaction Roles	Sales Roles In Long-Term Relationships			Key Account Manager Roles	Global Account Manager Roles
<i>Cunningham and Turnbull (1982)</i>	<i>Biong and Selnes (1995)</i>	<i>Corcoran et al (1995)</i>	<i>Wotruba (1996)</i>	<i>Millman and Wilson (1995)</i>	<i>Millman (1996)</i>
Information Exchange	Communication	Business Consultant	Sales Process	Information Broker Facilitator Co-ordinator Promoter Interpreter	Co-ordination Multi-cultural Teamwork
Assessment	Control	Business Consultant	Sales Process	Consultant Interpreter	External Relationship Management Account Planning
Negotiation and Adaptation	Conflict Handling Sales Aggressiveness	Strategic Orchestrator	Sales Position	Negotiator Mediator Business Manager (P&L)	Negotiation Multi-cultural Teamwork P & L Responsibility
Crisis Insurance	Control	Strategic Orchestrator	Sales Position	Facilitator	External and Internal Relationship Management
Social	Personal Similarity	Long-term Ally	Sales Person Sales Position	Customer Advocate	External Relationship Management
Ego-enhancement	Personal Similarity	Long-term Ally	Sales Person	Customer Advocate	External Relationship Management

Further recent work by Millman (1999b) on GAM roles and Millman and Wilson (1999) on GAM competencies are shown in Table 2.4.

Table 2.4: GAM Roles and Competencies

8 GAM Roles <i>(Millman 1999b)</i>	10 GAM Competencies <i>(Millman and Wilson 1999)</i>
<ul style="list-style-type: none"> • <i>Global account strategist</i> • <i>Co-ordinator of the account's centralised and dispersed requirements</i> • <i>Global account team manager/leader</i> • <i>Information broker</i> • <i>Relationship facilitator/builder</i> • <i>Negotiator</i> • <i>'Voice of the customer'</i> • <i>Corporate 'culture carrier'</i> 	<ul style="list-style-type: none"> • <i>Communication skills</i> • <i>Global team leadership and management skills</i> • <i>Business and financial acumen</i> • <i>Relationship management skills</i> • <i>Strategic vision and planning capabilities</i> • <i>Problem-solving capabilities</i> • <i>Cultural empathy</i> • <i>Selling skills (internal and external)</i> • <i>Industry and market knowledge (self and customer)</i> • <i>Product service knowledge</i>

Most recently, Millman and Wilson (2000) have suggested that the role of the global account manager is that of the *political entrepreneur*. However, there is a lack definition of what many of these labels mean, which can be addressed more thoroughly through more rigorous empirical research.

In addition to the summarised literature, Weitz and Bradford's (1999) '*partnering*' roles of salespeople are similar, but they also add the role of *value creator*. Rackham and De Vincentis (1998) use the term *strategic value customers* to describe customers that demand an extraordinary level of value creation, want more than simply products and advice and who want to deeply leverage the supplier's core competencies. These relationships are economically practical only between large suppliers and large customers (Rackham and De Vincentis 1998). Salespeople, key account managers and global account managers in this situation are likely to have a significant role as *strategic value creators*.

A review was also undertaken of the *international sales* literature but nothing could be found that had expressly focussed on the roles and skills required of international salespeople.

2.6 GENERAL CRITIQUE OF THE LITERATURE

The general critique of the literature takes each major pool of literature in turn. From the critique of the literature, the research gap is identified.

2.6.1 Critique of the Global Account Management Literature

Research on *global account management* is still at an early stage, although it is clearly gaining support as a topic worthy of research in the business-to-business marketing field. Most of the literature studied for this review has taken the form of conference papers or articles in the practitioner journals. Little has yet been published in academic journals of substance. There is thus a great deal of scope for further academic research in this field. But, it is not just global account management that is under-researched empirically, the topic of key account management is also under-researched empirically (Homberg et al. 2000).

To date, most of the research has focused on the supplier perspectives of GAM and, in particular, how suppliers are organising and implementing GAM. A notable exception is that undertaken by Senn and Arnold (1999) who surveyed industrial suppliers and their global customers to build a model of global account management implementation. The danger in this, as has been shown with KAM (McDonald, Millman and Rogers 1996, 1997), is that in order to more fully understand and research customer-supplier relationship management issues, a dyadic approach to the issue is required which involves gaining the customer's perspective on the chosen topic as well as the supplier's perspective. There is, therefore, scope to undertake dyadic research in the GAM context.

2.6.2 Critique of the Relationships in Business-to-Business Markets Literature

Much of the literature supports the view that long-term relationships in business-to-business markets are important to both customers and suppliers (Dwyer et al 1987; Wilson 1995; Weitz and Jap 1995; Frazier and Antia 1995), but while there are theoretical and conceptual models and frameworks for the variables that influence success and failure in relationships, for the antecedents and constituents of relationships, for process models of relationship development and for developing a customer-focused competitive advantage, there are fewer empirical studies and studies on the operationalisation of Relationship Marketing at the organisational level or individual relationship level and, in particular, from the customer's perspective. This view is supported in the literature where a number of authors have suggested that research should focus more in this area, including Wilson (1995) and Woodruff (1997).

Kotler (1988: 695) points out that *'the seller who knows how to build and manage strong relationships with key customers will have plenty of future sales from these customers.'* We need to understand more about the relational and interpersonal aspects of buyer-seller interaction and particularly how relationships are established, developed and maintained. However, there have only been a few studies on managing the buyer-seller interface (Spekman and Johnston 1986; Jackson 1994; Filiatrault and Lapierre 1997) and they do not elaborate the relationship management role in the buyer-seller interface at the individual interpersonal level. Cronin (1994) pointed out that studies of buyer-seller dyads often took a one-way approach, largely because the buyer-seller dyad is not always easy for the researcher to investigate. It is still the case that little attention has been given to the potential consequences of the dyadic relationship between a salesperson and buyer even though this dyadic interaction is a key component of many business relationships (Boles et al 1997).

While there are models for process development, there is no evidence of research into the boundary roles' management of the process and while Wilson (1995) states value creation as a major stage in relationship development he does not specify how the key

players in the relationship may create and enhance value and thus build closer relationships with customers where appropriate.

Burger and Cann (1995) found that a good relationship between buyer and seller is actually a need that most buyers would like to see fulfilled, but little attempt has been made to understand what these customers value as important in terms of how the relationship is managed or, indeed, what they require of the supplier's relationship manager, be they a salesperson, key account manager or global account manager. Indeed, few studies have examined relationships from the perspective of the organisational buyer or customer, with the exception of, for example, Crosby et al (1990), who looked at the quality of the relationship from the customer's perspective.

Gaining the customer's perspective as well as the supplier's perspective of what a global account manager does or should do, would, therefore, seem to be an appropriate focus for this research project.

2.6.3 Critique of the Role and Boundary Role Theory Literature

The role theory and boundary role theory literature would appear to provide an appropriate theoretical framework on which to base the research project. However, much of the research in these areas has focused on general management roles within the management behaviour literature. With the exception of the work on boundary roles and boundary role ambiguity (Singh and Rhoades, 1991; Singh, 1993), role theory and boundary role theory have been little explored in relation to marketing or sales roles.

2.6.4 Critique of the Global Account Manager Roles Literature

While Ford does make the point about the importance of the *relationship manager* role, the few studies discussed that are looking at the boundary spanning roles in long-term relationships are largely conceptual in nature or are based on research by practitioners and not academics (e.g. that by Corcoran et al, 1995).

Many studies are still focused on the more transactional role of the salesperson and on, for example, their performance, effectiveness, remuneration and motivation in their *selling* role. The area of relational selling roles, skills and behaviours is addressed in the literature but there remains much research to be done in this area. While there have been a few studies on the impact of relationship selling behaviours, further empirical research in this area would help to establish which function and roles of the boundary spanner's role, like a global account manager, are the most important in a relationship setting as opposed to a selling setting.

Companies are making significant investments in, for example, key account management programmes which are paralleled by a growing body in literature on the subject. While a few studies have looked at the roles and functions of key account managers, again there is little evidence from the customer's perspective on what they value from these roles. This equally applies for global account manager roles. What has been published tends to describe the roles in very broad terms, often using a competency framework and approach in describing the roles. Indeed Millman and Wilson (2000), whose work is largely conceptual, suggest that they have merely scratched the surface of the role of the global account manager and hope that '*their work will serve to stimulate others to explore what we believe to be an important area of interest*'.

Finally, while the structure of the *selling centre* is well covered in the sales literature, the role of the *inside salesforce* and the *selling team* has received scant attention in the literature, even though it is argued that they are important in managing relationships at the buyer-seller interface (Smith and Barclay 1993). Increasingly, such individuals are involved in key and global account teams, yet little research has focused on the perspective of these internal team members. As a group they are *role senders* for the global account manager and therefore gaining their perspective of what a global account manager does or should do would also seem to be an appropriate focus for this research project. This view is reinforced by Birkinshaw et al. (2001). The whole supplier side aspect of implementing global account management is suggested by Birkinshaw et al. (2001) as an area that requires further research. They argue that the success of global account management will rest on the ability of the supplier

¹Evidence for this statement comes from the Cranfield KAM Club which since its inception in 1998 has been attended by over 100 companies

organisation to co-ordinate its actions at corporate and local levels and that too much attention is focused on the relationship with the customer.

2.7 RESEARCH GAP

From the literature review presented and particularly with reference to the critique of the literature, the following research gaps were identified.

In spite of the recognition and support in the literature that interpersonal relationships are important, that managing long-term relationships is now of prime importance for suppliers, that relational selling behaviours can be influential in the relationship, and that boundary spanners are the key '*relationship managers*', little is known about interpersonal buyer-salesperson relationships and even less is known about how these relationships are established, developed and maintained (Garver 1998). In particular, there has been little research into how the customer perceives these roles.

GAM is a new and emerging phenomenon in the marketing literature. At present little empirical research exists in many aspects of GAM and, in particular, the roles of the Global Account Manager in managing global customer accounts requires more understanding and better definition. Work to date has been mostly conceptual. This research project builds on the work of Millman and Wilson in undertaking an in-depth analysis of the role of the global account manager.

Further, little research has been conducted that takes an holistic perspective of the roles. However, from the literature review, it was clear that in determining the roles of Global Account Managers it would be important to look at the roles from a number of different perspectives, given the context in which they are working. The approach adopted is supported by role theory, boundary role theory, dyad theory and the buying and selling centre theory.

Given the aforementioned gaps, it was possible to generate the research question and conceptual framework.

2.8 THE RESEARCH QUESTION

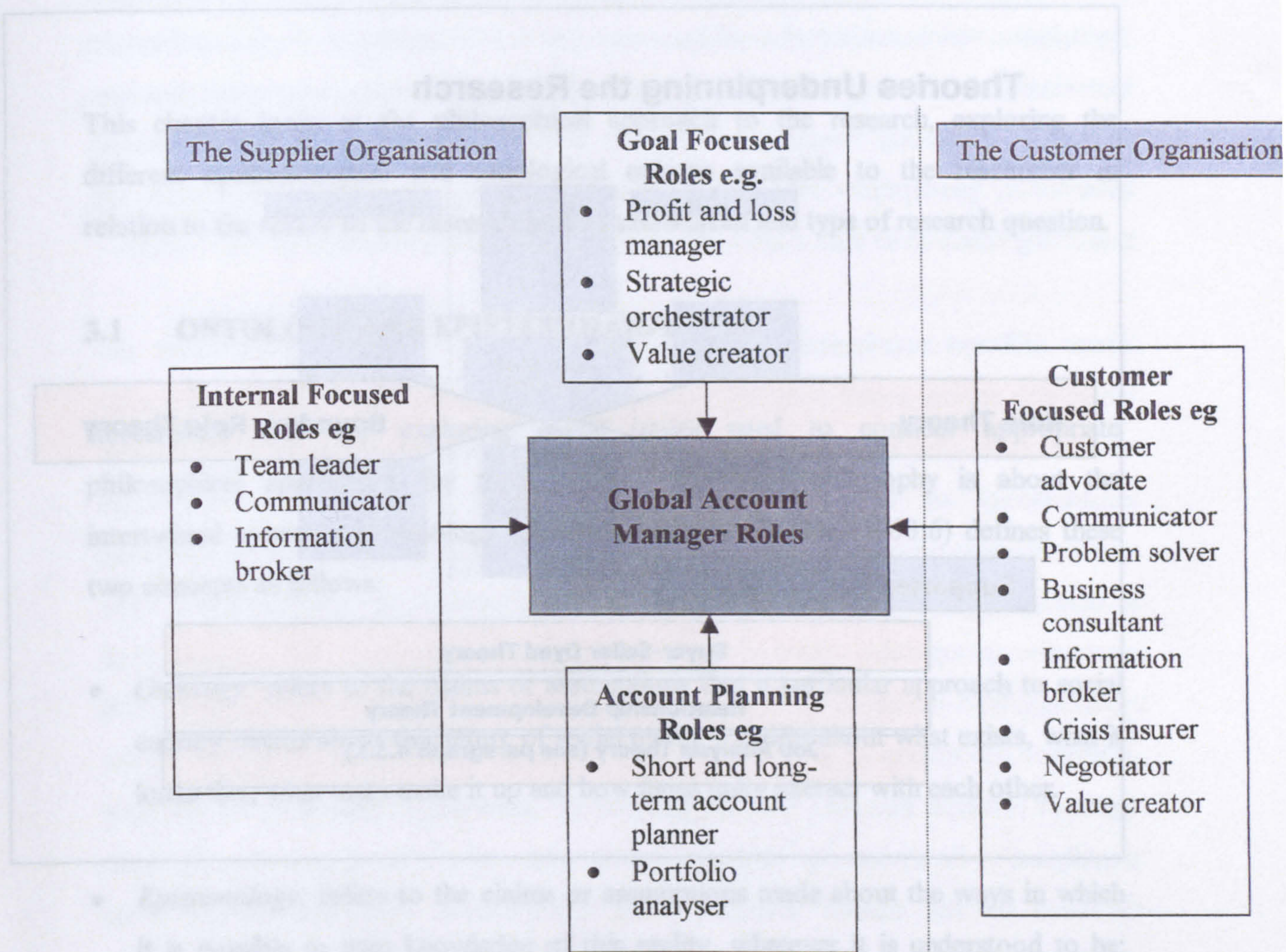
From the review of the literature and an identification of the research gaps, the research question was: *'What are the characteristics of the role of the Global Account Manager in managing global business-to-business customer relationships?'*

2.9 THE CONCEPTUAL FRAMEWORK

The literature review revealed that little empirical research existed that had sought to identify the roles of global account managers beyond a list of broad roles and activities. Because of the broad nature of these roles, it was not always clear from the labels given to them, a) exactly what the meanings are and b) how these would be interpreted in practice. The focus of the research was, therefore, to attempt to define more precisely the characteristics of the role from undertaking an empirical study that explored how global account managers and the other stakeholders interpret the role in practice. The preliminary conceptual model for the research is presented in Figure 2.9.

In order to build a conceptual framework for the proposed research, some of the broad roles were adopted as a starting point for operationalising the research. However, the study did not set out to test the meanings of the roles contained in the conceptual framework. The study set out to identify the roles as described by global account managers, their managers, their customers and their internal colleagues. While some of the roles that emerged from the data collection and analysis were, therefore, different from those presented in the conceptual framework, it is suggested that it was helpful, by way of explaining the framework, to start with an initial set of roles that were based in the literature. So, based on the literature review, including the theoretical perspectives, it has been possible to build a preliminary conceptual model around key types or groups of roles for global account managers. The groups are not mutually exclusive, but do reflect the boundary role situation of the global account manager.

Figure 2.9 A Conceptual Framework for Global Account Manager Roles

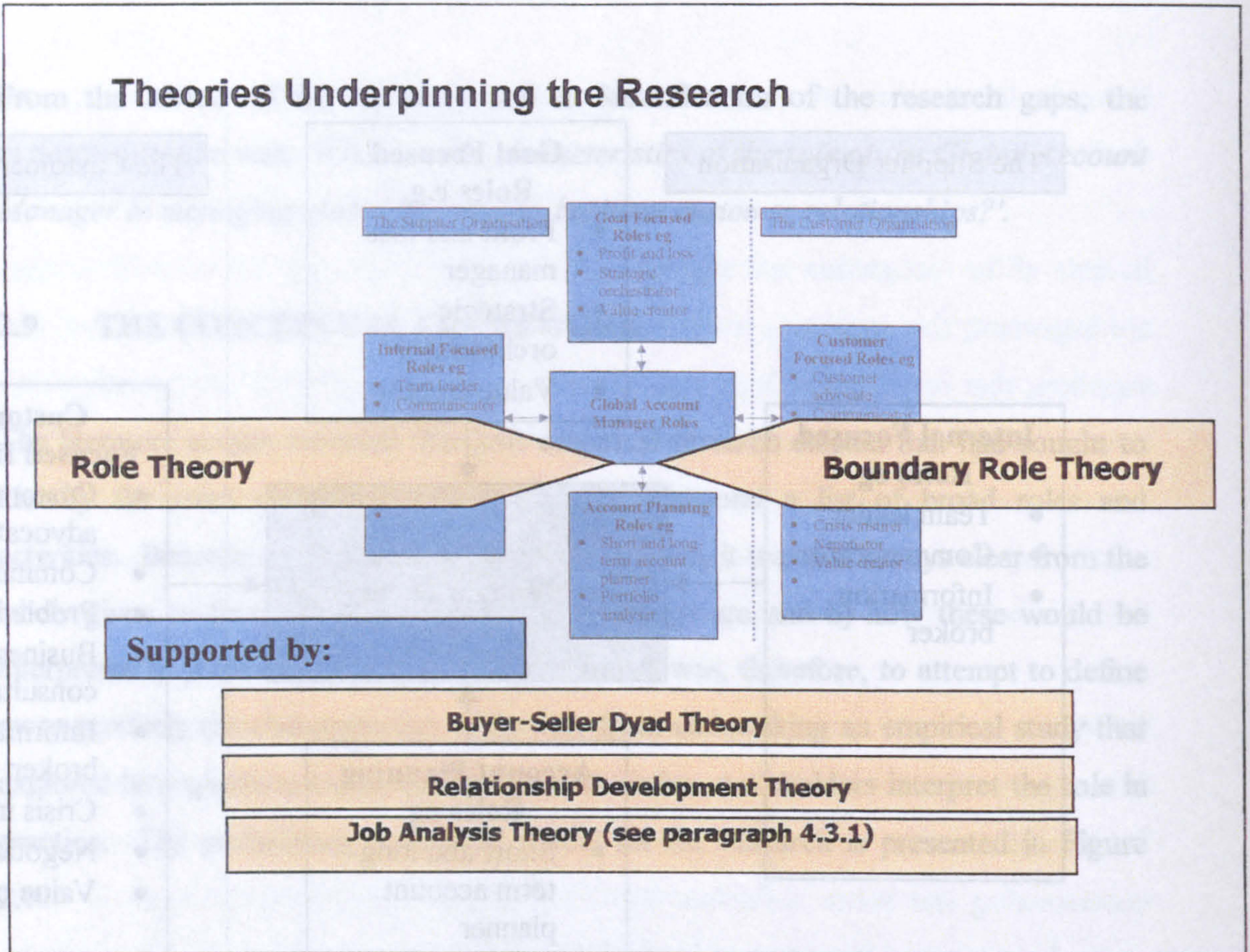


The framework is underpinned by the theories discussed in the literature review as shown in Figure 2.10.

2.10 Summary of Chapter 2

This Chapter has presented a review of the relevant literature and identified the research gap that the PhD seeks to address. From this a research question has been proposed and a conceptual framework built from the subject literature and from the various theoretical fields underpinning the research has been presented.

Figure 2.10: The Theories Supporting the Conceptual Framework



The thesis now moves on to Chapter 3 where the philosophical approach taken by the researcher is introduced through an exploration of the epistemological and ontological viewpoints of the social sciences as they relate to this research study.

CHAPTER 3: THE PHILOSOPHICAL APPROACH TO THE RESEARCH PROJECT

This chapter looks at the philosophical approach to the research, exploring the different epistemological and ontological options available to the researcher in relation to the nature of the research project undertaken and type of research question.

3.1 ONTOLOGY AND EPISTEMOLOGY

Researchers who are exploring social issues need to consider appropriate philosophical approaches for their studies. Scientific philosophy is about the intertwined concepts of ontology and epistemology. Blaikie (1993:6) defines these two concepts as follows:

- *Ontology*: refers to the claims or assumptions that a particular approach to social enquiry makes about the nature of social reality – claims about what exists, what it looks like, what units make it up and how these units interact with each other.
- *Epistemology*: refers to the claims or assumptions made about the ways in which it is possible to gain knowledge of this reality, whatever it is understood to be; claims about what exists may be known.

Ontology is concerned, therefore, with the view of social reality taken by the researcher. The extremes of this paradigm are, on the one hand, the view that knowledge is *out there* and exists independently of its being perceived and, on the other, that social reality is *constructed and reproduced by social actors* (Blaikie 1993). The two main schools that have come to represent these extremes are usually labelled *positivism* and *interpretivism* respectively: for ease of understanding these terms are used in this thesis. Positivist ontology, which has a close relationship to the natural science model of research, assumes order in nature and a belief in the generalisability of knowledge. Historically, research in marketing has very much been conducted within this paradigm, possibly because marketing as an academic discipline has emerged from economics and the behavioural sciences (Easterby-Smith

et al. 1991). Interpretive ontology, which embraces several major schools of social philosophy, sees the world as consisting of cultural objects, meanings and social institutions which are interpreted by social actors. Interestingly, despite positivism historically dominating marketing research, Hirschman (1986) argues that the key factors in marketing research are actually socially constructed e.g. human beliefs, behaviours, perceptions and values. More recently, there have been calls for marketing research to take a more interpretive perspective (Gummesson 1991, 2000).

These different ontological viewpoints are the subject of much disagreement and discussion among social scientists, as is the nature of how knowledge of each reality can be obtained; the *epistemological* approach. The main tenets of the positivist epistemology are that knowledge (evidence) must be obtained through direct experience and observation, with the researcher taking an objective stance, remaining a detached and unprejudiced observer of the phenomenon being studied. The alternative perspective views knowledge as deeply subjective and derived from meanings, with the researcher being involved as part of what is being observed. This difference of opinion in how knowledge is obtained has also had an impact on the types of research methods that are adopted by researchers working in the different paradigms. Positivism is strongly linked with using the quantitative methods favoured by the natural sciences, while Interpretivist researchers favour more qualitative approaches.

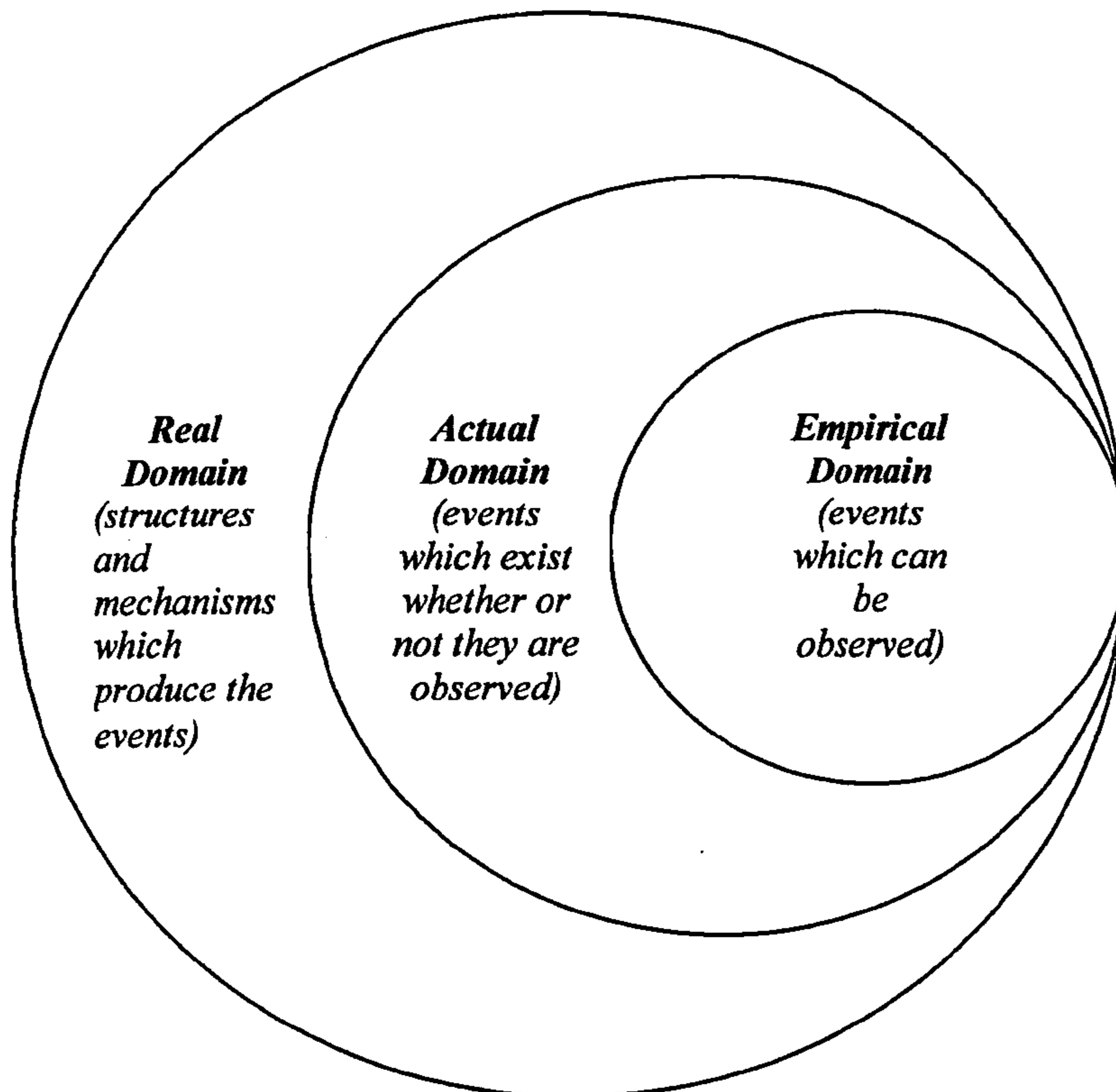
Between these two philosophical extremes lie several alternative schools, many of which have been born out of a reaction to the dominant Positivist approach to social enquiry and management research. Some of these are refinements and hybrid positions of the two extremes (Peck 1997) and one, in particular, *Realism*, is the philosophical stance adopted by the researcher.

3.2 REALISM

The philosophical approach taken to the research is that of Realism. The researcher is most closely aligned to scientific realism as proposed by Bhaskar (1978). Bhaskar's (1978) view of Realism (see Figure 3.1 below) proposes that experiences, events and mechanisms constitute three overlapping domains of reality, the *empirical* (events

which can be observed), the *actual* (events which exist whether or not they are observed) and the *real* (structures and mechanisms which produce the events). The aim of Realism is to explain observable phenomena with reference to underlying structures and mechanisms (Blaikie 1993).

Figure 3.1 Realism: Domains of Reality



Based on David Partington (1998) Cranfield Research Methodology Course

Realism accepts some tenets from Positivism that there are links between objects and events or causal explanations, but makes a distinction between a causal law and a pattern of events. It seeks to understand the intervening mechanisms which may indicate and explain, though not prove, casual relationships. Bhaskar argues that a *'constant conjunction must be backed by a theory which provides an explanation of the link between the two events.....which provides a conception or picture of the mechanism or structure at work...mechanisms are nothing more than the tendencies or powers that things have to act in a particular way'* (Blaikie 1993). Specifically,

'Realist Epistemology is based on the building of models of such mechanisms that, if they were to exist and act in a postulated way, they would account for the phenomena being examined' (Blaikie 1993). One important feature of Realism is the use of models with which the researcher attempts to predict the structures and mechanisms underlying the phenomenon being studied. It is then the role of the researcher to further develop such models, following experience in the field, to ultimately build theory. This view of the search for generative mechanisms is directly applicable to this research and the type of question being asked. The output of the research is expected to be a theoretical model of the roles of Global Account Managers.

Realism also accepts the Interpretist view that social reality is pre-interpreted and that society is both produced and reproduced by its members and is therefore both a condition and an outcome of their activity (Blaikie 1993). Lee (1999) suggests that individuals socially construct their job and role domains. Realism adheres to the view that the study of social sciences requires research methods which are appropriate for *social* settings. Realism also accepts that social laws need not be universal.

A Realist approach to marketing research has been supported and argued in the marketing literature (Hunt 1990, 1992; Peter 1992 and Zinkhan and Hirscheim 1992; Healy and Perry 1998), which provides support for taking this approach in respect of the proposed research. Zinkhan and Hirscheim (1992) argue that Realism *'provides an approach to causation that is very effective in describing [marketing] phenomena that act as enabling or inhibiting agents, rather than primary causes'*. Global Account Managers are the enabling agents of GAM and act as the enabling agents of the relationships with their stakeholders.

More specifically, Healy and Perry (1998) state that Realism is the most appropriate scientific paradigm within which to study network and relationship marketing and to explain the phenomenon of interrelationships. As has already been discussed, in business-to-business markets, the operationalisation of the relationship marketing paradigm for the selling organisation is carried out by those in boundary roles.

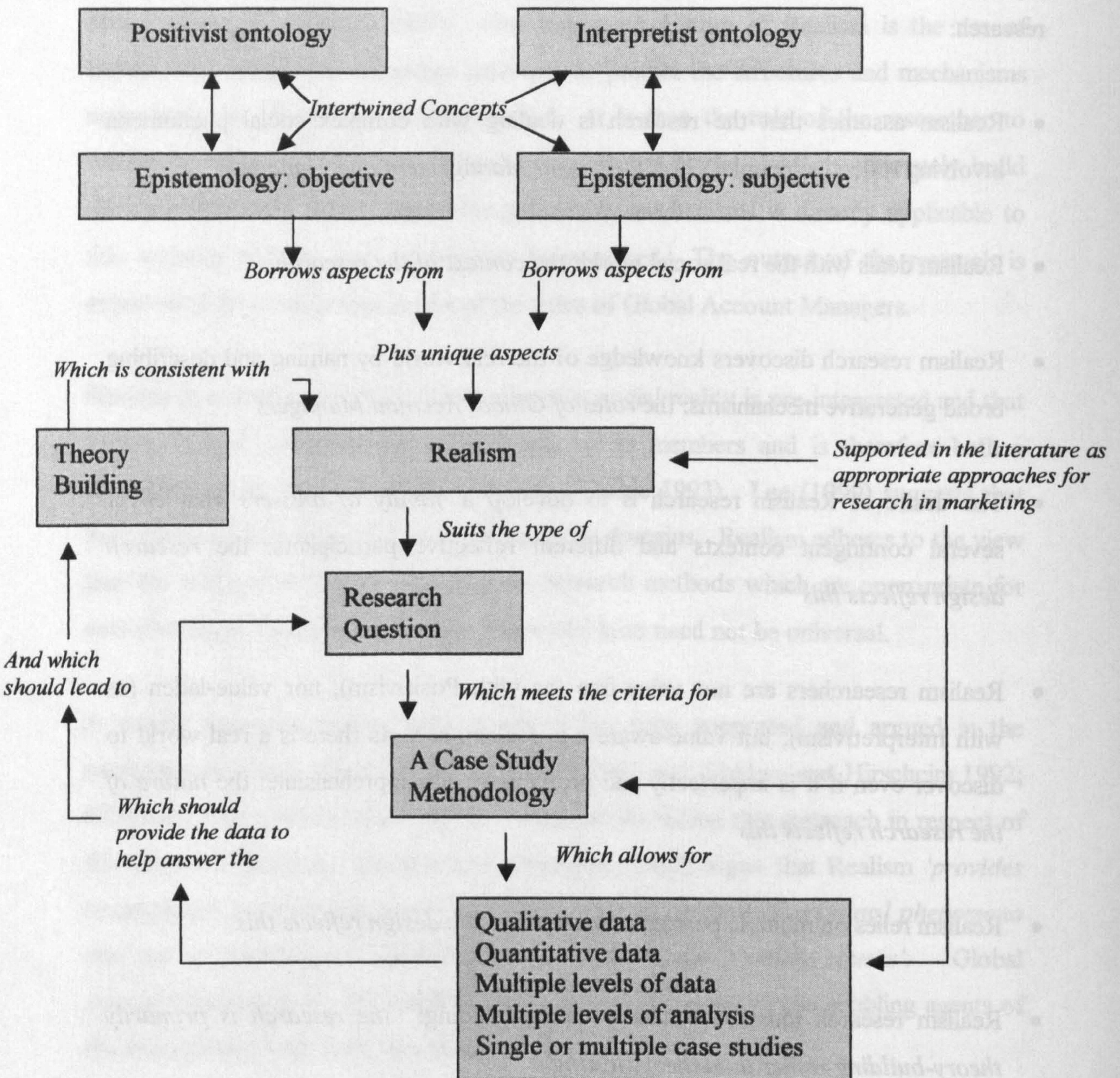
Healy and Perry (1998) go on to describe some key aspects of Realism that make it so appropriate. These are listed with reference, where appropriate, to the proposed research:

- Realism assumes that the research is dealing with complex social phenomena involving reflective people: *Global Account Management and Managers*
- Realism deals with the real social world: the *context of the research*
- Realism research discovers knowledge of the real world by naming and describing broad generative mechanisms: the *roles of Global Account Managers*
- The desire of Realism research is to develop a '*family of answers*' that cover several contingent contexts and different reflective participants: the *research design reflects this*
- Realism researchers are not value-free (as with Positivism), nor value-laden (as with Interpretivism), but value-aware e.g. realism accepts there is a real world to discover even if it is imperfectly and probabilistically apprehensible: the *nature of the research reflects this*
- Realism relies on multiple perceptions: the *research design reflects this*
- Realism research must be primarily theory-building: *the research is primarily theory-building rather than theory testing*

The Realism paradigm also places an emphasis on empirical research.

In summary, Realism fits with the researcher's view of social reality, the nature of the phenomena that has been studied, the research question and the research methodology, which is discussed in the next chapter. A model showing how these all link together is in Figure 3.2.

Figure 3.2 Research Strategy Map



3.3 SUMMARY OF CHAPTER 3

This Chapter has discussed the different epistemological and ontological approaches that are available to researchers in the social sciences. It has then looked in more detail at the preferred approach of the researcher which is Realism and an explanation of why this is an appropriate approach for the research project has been given with reference to existing philosophical and marketing literature.

CHAPTER 4: METHODOLOGY

This chapter looks at the overarching research strategy and provides a rationale for the decision to take a qualitative methodological approach. It presents the research design, data collection model, and explores the analysis techniques used to analyse the data.

4.1 RESEARCH STRATEGY AND METHODOLOGICAL APPROACH

4.1.1 Research Strategy

As explained in Chapter 3, the philosophical approach is that of Realism. With Realist research, the research strategy follows a *retroductive* approach that is an appropriate stance for such research (Blaikie 1993). In the course of retroductive research the phenomenon is observed and an explanation of the underlying mechanisms is developed, which is then represented by a model. This iterative approach as described by Peck (1997), starts with a descriptive *exploratory* stage, using empirical data, which is followed by an *explanatory* theoretical stage to produce a rational explanation of the patterns found in the empirical study. In this study, the *exploratory* stage is contained within the within-case data analysis (Chapters, 5,6,7 and 8), while the more *explanatory* theoretical stage is contained within the cross-case data analysis and the conclusions for the study (Chapters 9 and 10). While the study is primarily theory building, with a retroductive research strategy, theory building and theory testing can be interchanged as reality is exposed and compared with the underlying theory (Bonoma 1995). This process is referred to as *analytic induction* (Bryman 1998).

The second explanatory stage of a retroductive research strategy is also consistent with a Realist perspective. It is used by Realists as '*the process of generating hypothetical models of the structures and mechanisms which are assumed to produce observable phenomena*' (Blaikie 1993). In the construction of the models, ideas may be borrowed from known structures and mechanisms in other fields. However, Zinkhan and Hirscheim (1992) acknowledge that the models that are built do not

exactly duplicate the world as they are composed of abstractions and oversimplifications.

Global account management is an emerging but little known phenomenon. Therefore, the strategy outlined above, was felt to be the most appropriate given the purpose of the research, which is to build a model of what a Global Account Manager does and the nature of the research question, which is an exploratory *what* question. In taking an exploratory approach, through exploration and description it is hoped that some explanations may be suggested as to what the characteristics of the roles of global account managers are.

4.1.2 The Case for a Qualitative Approach

From what has been discussed so far, it was decided that a qualitative approach to the research design and methods was required which fitted with:

- (a) both the ontological and epistemological preferences of the researcher
- (b) the philosophical approach that has been proposed
- (c) the type of question that is being asked
- (d) the nature of the phenomenon being researched

Marshall and Rossman (1995) suggest that qualitative designs are the best choice when the researcher answers *yes* to one or more of the following questions:

- (1) Is it important for the researcher to understand the in-depth processes that operate within the organisation or industry ? **Answer: YES**
- (2) Do the research issues involve poorly understood organizational phenomena and systems ? **Answer: YES**
- (3) Is the researcher interested in the differences between stated organizational policies and their actual implementation ? **Answer: NO**
- (4) Does the researcher want to study ill-structured linkages within organizational entities ? **Answer: YES**

- (5) Does the study involve variables that do not lend themselves to experiments for practical or ethical reasons ? Answer: YES
- (6) Is the point of the study to discover new or thus far unspecified variables ? Answer: YES

If the study's purpose is *exploratory* in nature, e.g. to investigate poorly understood phenomena, then the researcher should consider case studies (Lee 1999). In summing up when to use qualitative research based on Miles and Huberman's (1994) considerations, Marshall and Rossman's (1995) recommendations and Maxwell's (1996) recommendations, Lee (1999) suggests that it is best used for *describing*, *interpreting* and *explaining*. He also points out that this is often done from the perspective of the organisational members under study.

Although research in marketing, particularly in the United States, has been very limited to statistical and mathematical methodologies combined with survey techniques (Gummesson 1991, 2000), Bonoma (1985) has advocated a greater use of qualitative methods in marketing theory and research. Certainly in Europe, it has become an acceptable approach in the 1980s and 1990s, particularly as a result of the work of the pan-European Industrial Marketing and Purchasing (IMP) group of researchers. The IMP group has focused on looking at inter-firm interactions and networks (Håkansson 1982; Ford 1990) using a range of qualitative and quantitative approaches. As the context for the research is global business-to-business relationships, it has followed the lead of the IMP, thus adding to the growing trend for qualitative research in the field of marketing (Carson et al. 2001).

Coote (1994) also suggests that qualitative research methodologies are particularly appropriate in relationship marketing where meanings are socially constructed and given meaning by the people involved rather than being external and value-free (Easterby-Smith et al 1991).

4.1.3 Choice of Case Study Approach

Case studies are useful where it is important to understand social processes in the organisational and environmental context (Hartley 1994). Yin (1994) gives three criteria for choosing a research method:

- (a) the *type* of research question posed
- (b) the *extent of control* an investigator has over actual behavioural events
- (c) the *degree of focus* on contemporary as opposed to historical events

From studying the situations that Yin (p. 6) gives for different research strategies, it became apparent that a *case study* approach would be an appropriate methodology to adopt for the research. It meets Yin's criteria for a case study in that it:

- (a) is asking an *exploratory 'what'* question
- (b) is investigating a *contemporary phenomenon* within its real-life context
- (c) the *boundaries* between the phenomenon and context are not clearly evident

In addition to meeting the criteria above, a case study approach is consistent with the Realist paradigm and retroductive research strategy and it is compatible with the skills and experience of the researcher. Easton (1995) argues that '*only Realism has properties which ensure a match with the particular characteristics of case research and thus provide a justification for case based knowledge claims*'. Tsoukas (1989) also says that Realist studies '*are either exploratory or explanatory in nature, and they usually have utilized, though this may not be exclusively, the case-studies form*'. Further, Healy and Perry (1998) have also discussed case study research within a Realist paradigm as it applies to a network and relationship marketing context.

Qualitative methodology and case studies provide powerful tools for research in management and case study research is becoming increasingly accepted as a scientific tool in management research and, more specifically, in marketing research (Wilson and Vlosky 1997; Gummesson 2000; Carson et al. 2001). Nonetheless, it is important to point out that case studies are not necessarily uniquely or wholly qualitative. Both

quantitative and qualitative methods are used for data collection in case studies. However, the latter will normally predominate in the study of processes in which data collection, analysis and action often take place concurrently (Gummesson 2000). In terms of data collection, a case study has a number of advantages. It allows for data collection on multiple levels, analysis on multiple levels and recognises that context is important. It is also an approach that is appropriate for theory-building (Eisenhardt 1989) which again is compatible with the research question.

Case studies are increasingly used for marketing research and, more specifically, have been used for many years as the *prime methodological approach* in Europe for researching business-to-business markets. This has been particularly promulgated, as already suggested, by the IMP Group (Cunningham 1980; Ford 1980; Håkansson 1982; Hallen, Johanson and Seyed-Mohamed 1991). It is thus felt to be an appropriate and supported methodology for this research.

It is important, however, to recognise that the approach outlined above is not without its problems in terms of academic acceptance. There have been major criticisms of case study research, particularly in relation to questions of validity and generalisation. Bonoma (1985) warns that *'qualitative researchers must be aware that generalisations in marketing theory may not be very general, and that they must be willing to deal with discomfiting new data to change or modify conclusions'*. Gummesson (1991) makes the point that *'science is a journey and the existing theory is not its destination'* and that in this light new data need not be discomfiting as they do not destroy existing theory, but rather expand and improve it. Normann (1970) says that the *'possibilities to generalise from one single case are founded in the comprehensiveness of the measurements which make it possible to reach a fundamental understanding of the structure, process and driving forces rather than a superficial establishment of correlation or cause-effect relationships'*. This is further supported by Gummesson (1991) who says that it is possible to use in depth studies based on exhaustive investigations and analyses to identify certain phenomena and thus lay bear mechanisms that one suspects will also exist in other companies.

It is possible, therefore to find support in the marketing literature for both a qualitative and case study approach. The arguments used also fit well with the Realist philosophical perspective.

There are some other important implications in the choice of philosophy and case study design. These are now discussed:

The Role of Prior Theory

The first of these relates to the role of prior theory or *a priori* theory. There is much debate about whether research should be theory-led (at the positivist end of the spectrum) or whether theory should be the outcome of the research (at the interpretivist) end of the spectrum. With Realist research the role of prior theory is acceptable (Blaikie 1993). More particularly, with case study research, it is suggested that it is helpful to develop some prior theory. Eisenhardt (1989) cautions, however, that while it is preferable to specify a research question and some *a priori* constructs, it must be recognised that these should remain tentative in case research. Fetterman (1989) also suggests that theory must be a guide to practice and that no study, qualitative or otherwise, can be conducted without an underlying theory or model. Miles and Huberman (1994) also suggest that a conceptual framework is a useful starting point for qualitative research as it helps to bound the research study, particularly for those new to qualitative research. This study has developed prior theory in developing the conceptual framework in Figure 2.9.

Theory Testing versus Theory Building

This second implication has already been discussed above. It is accepted that with a retroductive research strategy that it is likely that there will be elements of both theory testing and theory building. Case studies, and particularly multiple case study approaches to research often have elements of theory testing as well as theory building, even if their main focus is to build theory (Carson et al. 2001).

Induction versus Deduction

The third implication which is closely related to the other two is whether the research is taking an inductive or a deductive approach. With Realist research and case study research both approaches may be evident and a mixture of both is often required (Carson et al. 2001). With a multiple case study approach, for example, the within-case analysis may involve an inductive approach where the data is informing the theory, while the cross-case analysis is taking a deductive approach in confirming the (Miles and Huberman 1994; Carson et al. 2001).

Triangulation

The final implication discussed here is the issue of triangulation. Triangulation of data from several sources can be made in a number of ways (Yin 1994). Triangulation most commonly refers to the use of a number of different data collection methods such as combining qualitative interview data and survey data. However, it is also possible to improve confidence in the outcome of the research by the triangulation of data from different interviewee perspectives Carson et al. (2001). The structure of the research design will allow the triangulation of data from the four different respondent groups that took part in the field study (see paragraph 4.3).

4.2 RESEARCH DESIGN AND METHODS

4.2.1 Case Study Design

There are different ways to conduct an enquiry using a case study approach to research. However, Yin (1994) points out that case studies are particularly difficult to carry out effectively and frequently fail because the research design is not considered rigorous enough to be methodologically sound. Careful consideration needs to be given to matters of design and methodological rigour (Peck 1997).

Yin (1994) provides a useful typology for the basic types of design for case studies (see Figure 4.1).

Figure 4.1 Basic Types of Design for Case Studies

	<i>single-case designs</i>	<i>multiple-case designs</i>
<i>holistic (single unit of analysis)</i>	TYPE 1	TYPE 3
<i>embedded (multiple units of analysis)</i>	TYPE 2	TYPE 4

From Yin (1994)

A single case study design was felt to be inappropriate since a case study organisation for the research was unlikely to meet Yin's criteria for justifying the use of a single case study. Generally, single case studies are carried out in situations which are either *unique, extreme, or revelatory* or where the case is a *critical case* which is testing a

well-formulated theory. As Peck (1997) pointed out, where the theoretical basis of the study is not sufficiently developed or defined, using a single case study would not be compatible with a Realist approach or retroductive case study. Single case studies are also more prone to criticisms surrounding lack of rigour.

This study has, therefore, used a multiple-case design. The case study design (see Figure 4.2) was based on the 'Type 3' *multiple, holistic case study* research design.

Figure 4.2 Original Case Study Design

Case Study 1	
Relationship 1:	<i>Interdependent</i>
Relationship 2:	<i>Interdependent</i>
Relationship 3	<i>Interdependent</i>
Case Study 2	
Relationship 1	<i>Interdependent</i>
Relationship 2	<i>Interdependent</i>
Relationship 3	<i>Interdependent</i>
Case Study 3	
Relationship 1	<i>Interdependent</i>
Relationship 2	<i>Interdependent</i>
Relationship 3	<i>Interdependent</i>

It was originally intended to undertake the research in three case study organisations. There are few guidelines as to what would constitute a sufficient number of case studies for a doctoral or other research project. While some researchers have endeavoured to suggest actual numbers (e.g. Eisenhardt, 1989 suggested within a range of four and ten), others offer little or no guidance (Bonoma, 1985; Yin, 1994). The original choice of three cases was determined by resource limitations and the time frame for the study, which are acceptable issues to take into account (Yin, 1984). This is also consistent with other studies carried out (Harrison, 1997; Palmer, 2001).

The decision was also partly determined by the ease and availability of access. One very practical advantage with a case study approach for qualitative research is in gaining access to companies. This of course should not be the major reasons for choosing the approach, but successful research often has to take place within constraints of time, access and funding and some have gone as far as to say that nowadays, research questions may be determined more by access possibilities than by theoretical considerations (Easterby-Smith et al 1991). This is not, however, the recommended route and for this study, the research question and theoretical conceptual framework were built prior to considerations of access.

Within each organisation it was intended to identify and study three buyer-seller dyads, giving a total of nine dyadic relationships overall. Each of these relationships could also be considered a mini-case study or sub-case study in its own right. The case study organisations are multi-national *suppliers* who have established long-term relationships with identified strategic global customers. Having a clearly defined context is important in Realist research, so all the case study organisations had recognised global account management programmes.

The evidence from multiple case studies is often considered more compelling and the overall study is therefore likely to be more robust (Herriott and Firestone 1983). It is possible with multiple case studies to follow a *replication* logic rather than a *sampling* logic. It is important to note that multiple case studies cannot be seen as the same as multiple respondents in a survey (Yin 1994). As Yin points out:

'....case studies, like experiments, are generalizable to theoretical propositions and not to populations or universes. In this sense, the case study, like the experiment, does not represent a sample and the investigator's goal is to expand and generalise theories (analytic generalisation) and not to enumerate frequencies (statistical generalisation).'

Miles and Huberman (1994) also suggest that multiple-case sampling adds *confidence* to findings. If the researcher is following a replication strategy, then it is possible to strengthen the precision, validity and the stability of the findings (1994). Each case must be selected so that it either (a) predicts similar results (a *literal replication*) or

(b) produces contrasting results but for predictable reasons (*a theoretical replication*). This study took the form of a literal replication, since the small number of cases precluded the possibility of producing a theoretical replication, where Yin (1994) suggests that a minimum of six case studies would be required. A *literal replication* approach is also viable if it is likely that a second organisation will hold an identical or very similar set of a theory's variables as that found in the first case (Lee 1999).

Like Yin, Miles and Huberman (1994) also point out that with a multiple-case approach compared to a single-case approach the issue of generalisability still does not essentially change. With multiple case study designs, the researcher is still generalising from one case to the next on the basis of a match to the underlying theory and not to a larger universe (Miles and Huberman 1994).

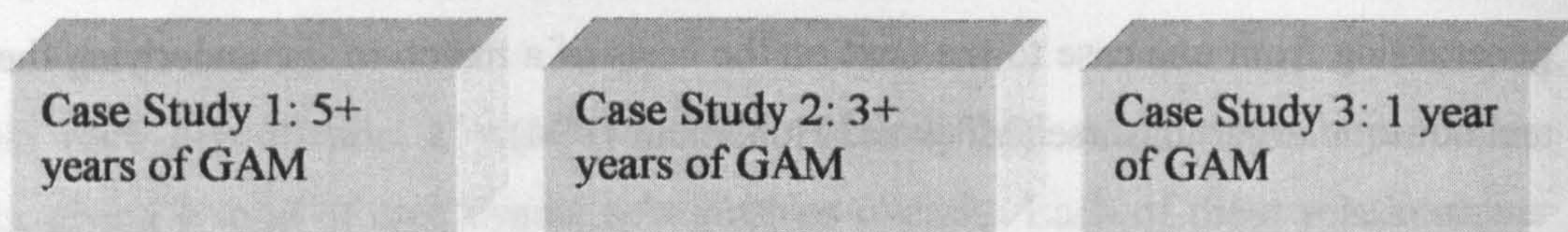
The design utilised multiple sources of evidence as suggested by Yin (1994). A range of data collection methods was considered and these, including the chosen methods, are discussed below.

4.2.2 Rationale for Choice of Case Organisations

Three companies were initially chosen. The rationale for the choice of case organisations can be strengthened through the use of theoretical sampling where cases are chosen for theoretical reasons and not for statistical reasons (Eisenhardt 1989; Miles and Huberman 1994). Firstly, each case organisation needed to be a multi-national company (supplier), operating on a global basis, with an existing Global Account Management structure to ensure that the context of the research was bounded. As such, these were considered to be those organisations who had some competence in Global Account Management. This is supported by Miles and Huberman (1994), who suggest that the research question and conceptual framework will guide the sampling. As the number of case studies is small, it is also important to choose ones where the phenomenon of interest is '*transparently observable*' (Pettigrew 1988). Secondly, they will be in different industries. This has a number of benefits. It allows for a more rigorous within-case and cross-case analysis of the phenomenon. It also helps the identification and separation of context specific data from that data which appears to be found in more than one case. This was helpful in

ascertaining the extent to which some aspects of the Global Account Manager roles may be context specific. Thirdly, access is an important factor in the selection of case studies. To conduct the type of study proposed, it was important to maintain a high level of co-operation and access with the case study organisations.

Another consideration was the length of time that each organisation had managing a global account management programme. In order to again allow for a more rigorous cross-case analysis of the data it was decided to look at a spectrum of organisations.



Marshall and Rossman (1999) stress the importance of finding realistic sites for the research. They describe a realistic site as one where:

- (a) entry is possible
- (b) there is a high probability that a rich mix of the processes, people, programs, interactions and structures of interest are present
- (c) the researcher is likely to be able to build trusting relationships with the participants in the study
- (d) data quality and credibility of the study are reasonably assured

The prospective cases were all compared against these criteria as well.

4.2.3 Identification of Appropriate Dyadic Relationships Within Each Case

In order to ascertain whether the individual customer-supplier relationships were *interdependent* type relationships (see paragraph 2.3.2), a diagnostic instrument was used to determine the nature of the relationship for the chosen customer-supplier relationship. While this instrument is very subjective in nature, it does allow an approximation of where the relationship lies on the relational development model. This instrument is based on an existing instrument developed and tested by McDonald and Woodburn (1999). A copy of the instrument is at Appendix 1. In order to

facilitate the research as quickly as possible, only the supplier's perspective on the relationship was taken. All the relationships were of the interdependent type. The key characteristics of this type of relationship for key accounts are (McDonald et al. 2000):

- Both acknowledge importance to each other
- Principal or sole supplier
- Exit difficult
- High level of information exchange, some sensitive
- Wide range of joint and innovative activity
- Large number of multi-functional contacts
- Streamlined processes
- Prepared to invest in relationship
- High volume of dialogue
- Excellent understanding of customer
- Developing social relationships
- Development of trust
- Proactive rather than reactive
- Joint strategic planning and focus on the future
- Opportunity to grow the business.

Many of these characteristics were also evident in many of the comments from the respondents across the four case studies.

4.2.4 Choice of Methods

There are a number of methods on which the qualitative researcher can draw. Silverman (1993) summarises these as:

- Observation
- Analysing text and documents
- Interviews
- Recording and transcribing

All these were considered as they may be used singly or in combination. Observation e.g. perhaps shadowing what Global Account Managers do, was an option, but due to the huge costs in carrying out the research in this way, from a pragmatic perspective, this was not felt to be a viable approach. Also, this method would not have allowed the types of probing for understanding and meaning that the research question requires. Some analysing of text and documents was needed. For example, job descriptions and person specifications of Global Account Managers, where these exist, were examined. Also, any key documents about the Global Account Management programmes were useful for gaining knowledge of the context of the research.

However, the main method for gathering data in response to the research question was interviews, which were recorded (with permission of the respondent) and transcribed prior to analysis of the data collected during the interview. Interviews were considered the most appropriate method in that they allowed for in-depth insight into the phenomenon and could be targeted and focused directly onto the case study (Yin 1994).

4.2.5 Choice of Qualitative Semi-Structured or Focused Interviews

The choice of *conversational semi-structured interviews* as the main data collection instrument allows for an overarching topic, general themes, targeted issues and specific questions, often with a predetermined sequence for their occurrence (Lee 1999). However, as with a completely unstructured interview, but unlike a completely structured interview, the interviewer is free to pursue matters as circumstances dictate (Lee 1999). In a study by Lee et al (1996), the interviewers entered with a pre-determined interview schedule but were also 'instructed to freely pursue emergent topics and themes and to probe more deeply than the initial planned questions' (Lee 1999).

It has also been suggested (Marshall and Rossman, 1999) that a degree of systematisation in questioning may be necessary in situations where there is a multi-site case study or when many participants are interviewed which is the case with this research. Easterby-Smith et al (1991) suggests that this type of interview can be

especially useful '*when the researcher feels she knows fairly well what she is after but sees that a greater insight might be gained from permitting the respondent to choose his own path*'. In this case, though, the broad parameters are clearly set by the researcher (Easterby-Smith et al. 1991).

It has been suggested by Lee (1999) that the conversational qualitative interview is effective and useful in generating theory. Lee also likens a qualitative interview to a job analysis interview, something that remains an active topic of research among human resource academics (Gatewood and Field 1994). Given the nature of the research topic, which is in essence a job analysis of the Global Account Manager role, this was felt to be highly relevant in providing a firm base from which to carry out the data collection.

Using a semi-structured interview also allowed the interview protocol, particularly that developed for the Global Account Manager, to be based directly round key aspects of the conceptual framework e.g. *customer* roles, *internal* roles, *goal-focused* roles and *account planning* roles. This type of interview is also termed a *focused* interview (Merton et al. 1990) where the interview remains open-ended with a conversational manner, but where the interviewer is following a certain set of questions derived from the case study protocol (Yin 1994).

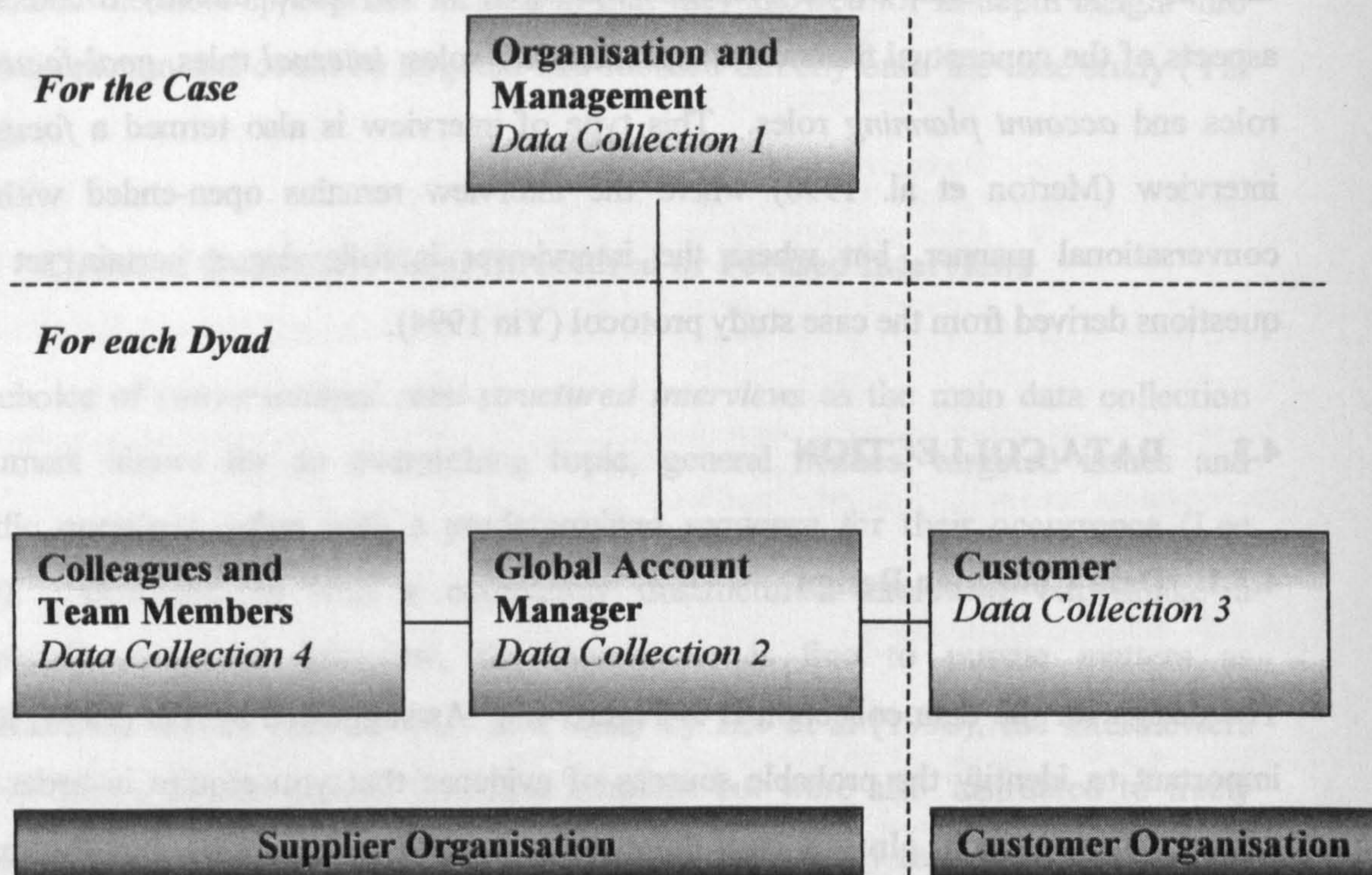
4.3 DATA COLLECTION

4.3.1 Data Collection Design

The design for the data collection is in Figure 4.3. As suggested by Yin (1994) it is important to identify the probable sources of evidence that you require in order to answer your question. In this case the sources have been organised into four key groups. This design is also supported theoretically in the literature review and, in particular, by boundary role theory and the literature on business-to-business organisational interfaces. In order to fully understand the roles of the global account manager it will be necessary to collect data from the global account manager themselves and from their customer, manager and colleagues/team members.

Given that the research topic is about a specific type of *job*, the data collection design is also supported in the human resources literature on job analysis as described by Lee (1999). For example, when analysing a job, it is likely that the job analyst will need to ask supervisors, job incumbents, peers/sub-ordinates questions about a given job's roles. Lee also points out the importance of the job analyst *'being aware of and sensitive to the organisation's political structures, individuals' hidden agendas and inter- and intra-group histories'*. He further suggests that the job analyst must thoroughly understand the role's *contextualising* features. *'Thus, the analyst must fully clarify the dependency between the job (or role) and its context in order to describe the focal job (or role) meaningfully'* (Lee 1999). In order to do this it was important to carry out an interview at the organisation level as well as those interviews directly related to the research question.

Figure 4.3 Data Collection Design



The methods used for each category of data collection was as follows:

Organisation: Data Collection 1

A brief *history and overview of GAM* in the organisation was obtained, usually from the most senior manager involved in the process, or the Global Account Manager's manager if this was more appropriate. If other managers were identified as further key informants, then they were interviewed as well.

Existing *job descriptions and organisational structures* for global account managers, where these existed, were also collected.

Global Account Manager: Data Collection 2

To obtain the global account manager's perspective, a semi-structured face-to-face or telephone interview was used. Telephone interviews were used where location made it difficult to carry out face-to-face interviews.

Customer: Data Collection 3

To obtain the customer's perspective, a semi-structured face-to-face or telephone interview was used. Telephone interviews were used where location made it difficult to carry out face-to-face interviews.

Colleagues and Team Members: Data Collection 4

To obtain the colleagues/team member's perspective, a semi-structured face-to-face or telephone interview was used. Telephone interviews were only used where location made it difficult to carry out face-to-face interviews.

Interview protocols were drawn up for each respondent (or informant) type. These can be found in Appendices 2A-D and are discussed in more detail below. Respondents were given the interview protocols in advance of the interview. This was done request of the first case organisation, who felt the interview time would be better focused. This is largely due to the fact that the respondents are mostly senior executives or *elite* individuals (Marshall and Rossman 1999) who can be elusive and busy people operating under demanding time constraints. Also, from a pragmatic

perspective, as many of the interviews were carried out through international telephone calls, involving a significant cost element, this was felt to be an acceptable strategy. The researcher recognises that while this could be open to the criticism that giving respondents the questions in advance could have implications in terms of reliability of responses and skewed responses, the nature of the interview protocol and the nature of the focus of the research is such that this was unlikely to be a significant problem. If the research was on a particularly sensitive or political area of management, this approach may well have caused a problem. However, it has been used successfully by other researchers (Sturges 1995).

Interviews were recorded and transcribed and notes were made during and following the interviews to supplement the verbal data. The diagnostic questionnaires were also analysed and documented. All other documentation, job descriptions etc, (including those documents forming part of the case study protocol), was retained on a *case study database* which is mostly held on a CD-Rom, so as to preserve the *chain of evidence* suggested by Yin (1994) as being one way of increasing *construct validity*.

4.3.2 The Case Data Interview Protocol: Data Collection 1

This protocol (see Appendix 2A) was designed to collect background data for the case study organisation and to gain the top management perspective of the Global Account Management programme and role of Global Account Managers. This was important for establishing the context within which the Global Account Manager is working as suggested by Lee (1999). The interview also provided an opportunity to gather any documents and to ascertain what documentation might exist that could be forwarded to the researcher by the organisation, if not immediately to hand. The core areas of the interview were:

- (1) Background to GAM Programme within {the case organisation}
- (2) Structure of Global Account Management within {the case organisation}
- (3) Roles, Skills, Person Specification, Selection, training, development and reward of Global Account Managers
- (4) GAM Programme documentation

- (5) Success of the GAM Programme and its Future
- (6) Any other comments or issues respondents would like to make about {the case organisation's} GAM programme

Within each of these core areas, there are a number of open-ended questions, some of which are structured, for example, fact-finding and background information, while others are seeking perceptions and views. This interview was carried out before any other interviews were undertaken in the case organisation. The data from the interview was used to build the context of the research study and also to elicit some data that was directly applicable to the research question and conceptual framework.

4.3.3 The Global Account Manager Interview Protocol: Data Collection 2

The majority of the Global Account Manager interview protocol (see Appendix 2B) was designed to directly reflect the conceptual framework; questions are focused on customer-focused roles, internal-focused roles, goal-focused roles and account planning roles. It was decided, for all of the interviews, not to use the sub-labels in the framework as a starting point, but *to let the informants describe the roles and activities in their own words.*

It was also felt that asking questions related to the personal background of the Global Account Manager might elicit data that would inform the conceptual framework. Also, in terms of context it was important to have some information about the customer organisation. This was helpful for the researcher when the customer interviews took place, since the researcher could sound knowledgeable about the customer organisation, something that is helpful when interviewing *elites*. The core areas of the protocol were:

- (1) Personal Background
- (2) General Background on the Customer
- (3) GAM Customer-Focused Roles
- (4) GAM Account-Planning Roles
- (5) GAM Internal-Focused Roles
- (6) GAM Goal-Focused Roles
- (7) Other questions

- (8) Any other key aspects of the job that you would like to highlight

Again, within each of these core areas there are a number of open-ended type questions allowing, for example, deeper probing and clarification. This interview needed to take place before the customer and internal colleague interviews.

4.3.4 The Customer Interview Protocol: Data Collection 3

The Customer interview protocol (see Appendix 2C) was also designed to be part contextual and part focused on the research question and conceptual framework. However, this interview is obviously focusing on the *customer-focused roles* of the Global Account Manager as perceived by the customer.

4.3.5 The Internal Colleague Interview Protocol: Data Collection 4

The Internal Colleague interview protocol (see Appendix 2D) was the same as the customer interview protocol except that the emphasis was on the *internal-focused roles* of the Global Account Manager as perceived by the internal colleagues.

4.3.6 Number of Interviews Carried Out

As with the number of case studies, there is little guidance in the literature on the number of interviews that would constitute a sufficient data collection for a PhD research project. However, Perry (1998) suggests that a PhD thesis should comprise somewhere between 35 and 50 interviews. Carson et al. (2001) suggest that from their experience and evidence that at least 30 or so interviews are required to provide a credible picture in a reasonably sized research project. From the table at Figure 4.6 it can be seen that the study involved some 43 individual interviews, 39 of which were transcribed for analysis from the tapes. Where they were not transcribed in four instances, this was due to the recording being unsatisfactory for technical reasons to do with recording international telephone conversations or problems with the tape recorder. However, the researcher made field notes of each interview as well as recording them and these were used when a transcript could not be produced.

4.4 DATA ANALYSIS

4.4.1 Units of Analysis

As already discussed, case studies often have more than one unit of analysis and identifying the units of analysis can be difficult. In an organisational study, the units might be process units such as meetings, *roles*, or locations (Yin 1994) or units that focus on individuals, dyads, groups, processes or organisations (Marshall and Rossman 1999). So, for this study the unit of analysis is the *roles* of the Global Account Manager.

4.4.2 Data Analysis Techniques

Marshall and Rossman (1999) suggest that typically (and very pragmatically), the analytic procedures fall into six phases:

- (a) organising the data
- (b) generating categories, themes and patterns
- (c) coding the data
- (d) testing the emergent understanding
- (e) searching for alternative explanations
- (f) writing the report

This study broadly adopted these stages as a basis for carrying out the analysis, but with reference to some specific strategies discussed below.

There are many forms of qualitative data analysis techniques ranging from *content analysis* at one end of the spectrum, where the researcher goes by numbers and frequency, to a *grounded theory* approach, where the researcher goes by feel and intuition (Easterby-Smith et al 1991). Grounded theory provides a more open approach to data analysis, which is particularly good for dealing with transcripts where the researcher systematically analyses to tease out themes, patterns and categories. While this study did not take a grounded theory approach, the data was analysed using categories and sub-categories. However, unlike grounded theory, the

data was initially analysed against the broad categories found in the conceptual framework e.g. customer-focused roles, internal-focused roles, goal-focused roles and account planning-focused roles. Sub-categories of these broad categories were then created as the data analysis proceeded. The role constructs as they emerged were derived from the interviews. The comments from the interviewees were not tested against the sub-categories on the original conceptual framework as has already been explained in paragraph 2.9. It was felt to be important by the researcher that the role constructs came from the respondents and not from the roles in the literature which had links to sales and key account management terminology.

Both Miles and Huberman (1994) and Marshall and Rossman (1999) suggest that prior theory, research questions, conceptual frameworks and the related literature review should provide guidelines for data analysis, as this earlier planning and grounding can be used to suggest several categories that can serve to code the data initially for subsequent and further analysis. Carson et al. (2001) also point out that the coding categories should usually be determined by the research issues that were the starting point for the research. They suggest that for *in-depth case studies* the data might be analysed by using a conceptual framework, derived from prior theory in the literature where the dimensions of the conceptual framework then provide the codes under which to consider the data. They go on to say that *'further assessment and analysis of these codes.....should lead to a further stage of categorising the findings into different levels, priorities or aspects of activities ...that can then be explained or justified in context (Carson et al. 2001: 109)*. They argue that such an approach offers a more in-depth focus to theory building particularly in the comparison of the conceptual and descriptive models, which in turn can then be used in further studies seeking to replicate the theory. The approach outlined in this paragraph is also consistent with a Realist philosophy.

4.4.3 Within-Case and Cross-Case Data Analysis

It is customary with analysing more than one case study for the *within-case* analysis to precede the *cross-case* analysis, because the case data provides the data for the cross-case analysis (Carson et al. 2001). Yin (1994) also suggests that where the research takes the form of a multiple case study, then the appropriate analysis of the

unit of analysis should first be conducted *within each case*. Patterns or explanations from each single case can then be compared across cases, following the replication mode for multiple cases. Eisenhardt (1989) also suggests that the overall idea is to become intimately familiar with each case as a stand alone entity. This allows the patterns for each case to emerge before the researcher seeks to identify patterns across cases. So, the results should be interpreted at single case level and then conclusions drawn for the multiple cases. The final step is to draw conclusions for the multiple cases that become the conclusions for the overall study. The within-case analysis followed a strategy outlined by Miles and Huberman (1994) and the cross-case analysis followed the replication strategy outlined by Yin (1994). This study followed this custom both for the data analysis stage of the study and for the subsequent writing up of the thesis.

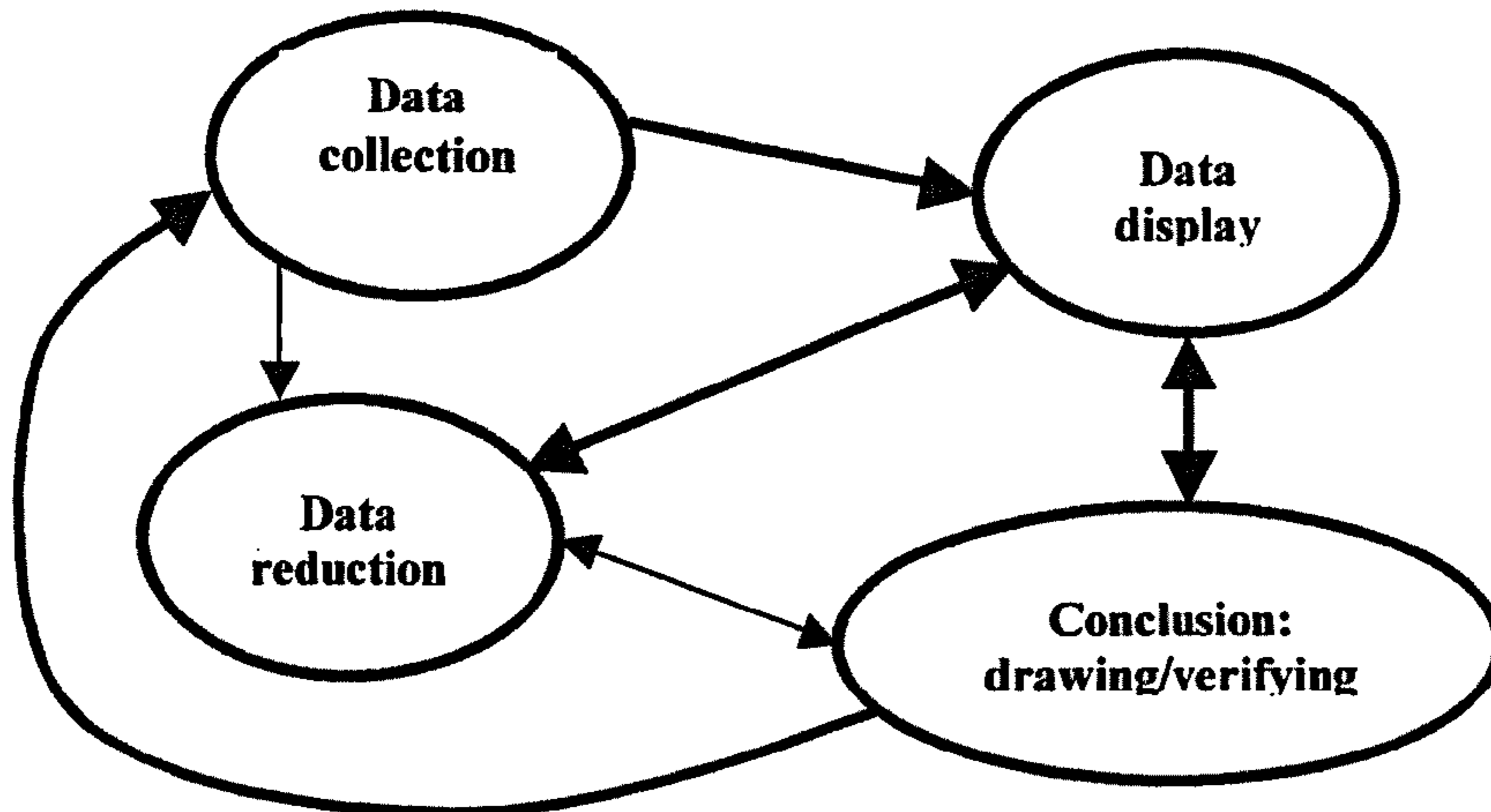
Miles and Huberman (1994) define the *analysis* of qualitative data as consisting of three concurrent flows of activity: *data reduction*, *data display* and *conclusion drawing/verification*. *Data reduction* refers to the process of selecting, focusing, abstracting and transforming the data. *Data display* refers to an organised, compressed assembly of information that permits conclusion drawing and action. Historically, these have comprised extended text. However, Miles and Huberman (1994) suggest that better displays take the form of many types of matrices, graphs, charts and networks. This is consistent with a Realist perspective.

Conclusion drawing and verification is something that happens from the start of the data collection, where the qualitative researcher is noting e.g. regularities, patterns, explanations, possible configurations etc. Conclusions are also *verified* as the analysis proceeds. Miles and Huberman (1994) make the point that verification may be '*as brief as a fleeting thought crossing the analyst's mind during writing, with a short excursion back to the field notes*'. Alternatively, it may need to be a thorough and elaborate process, with lengthy argumentation and peer reviews or extensive efforts to replicate a finding in another data set.

Miles and Huberman (1994) see these three streams as interwoven before, during and after data collection to make up the general domain called *analysis*. Figure 4.4 shows how these three types of analysis activity and the activity of data *collection* 'form an

interactive, cyclical process'. The nature of this study is likely to require such an iterative data analysis strategy.

Figure 4.4: Components of Data Analysis: Interactive Model



Source: Miles and Huberman (1994)

In carrying out cross-case analysis, Eisenhardt (1989) advises that the researcher should select the categories or dimensions suggested by the within-case analyses and then look for within-group similarities coupled with differences. For the cross-case analysis, Miles and Huberman (1994) suggest that while it can multiply the data set by the number of single cases which can produce hundreds of pages of interview scripts, it can be made manageable by adopting a few rules. These include making cross case data comparable through the use of common codes, common displays of commonly coded data segments and common reporting formats for each case. They argue that:

'Codes, displays and reporting formats are all data-reductive devices for condensing hundreds of pages of text into workable, intellectually coherent units - tables or figures and associated analytic text'.

Miles and Huberman (1994)

This study has adopted all three of these guidelines throughout the data analysis process and during the writing up of the four case studies.

4.4.4 Categories, Coding, Constructs and Use of a Qualitative Database Package

Coding data is the formal representation of analytic thinking, while the tough intellectual work of analysis is generating categories and themes (Marshall and Rossman 1999). As already explained, the initial top level categories or codes were based on those found in the conceptual framework which itself reflects the research question. Carson et al (2001) also suggest that the use of prior theory to provide codes shows that prior theory is emphasised again in the data analysis part of the report of the case-based research. The initial top level codes were:

- Goal-focused roles
- Customer-focused roles
- Internal-focused roles
- Account planning-focused roles

However, while creating a start list of codes is helpful, the analyst must be ready to redefine or discard codes (Miles and Huberman 1994). The role constructs that emerged from the coding were named from the terms that were used by the respondents to describe the role. They were deliberately not codes named from the literature. This was to ensure that the descriptions of the role were as close as possible to the context and the people from which they were emerging. The names given to the roles of the global account manager in the literature are largely drawn from and extended from the long-term sales and key account management literatures rather than from direct interaction with global account managers and their managers, customers and internal colleagues.

Once the interviews were transcribed, some directly by the researcher using a word-processing package, the coding process began against these broad categories, with sub-categories or sub-codes being added as the analysis progressed. At this point a fifth top level tree node was added to the four from the conceptual framework; *spanning-focused roles*.

The data was categorised, coded and analysed with the aid of a qualitative database package, QSR NVivo. There are a number of such database packages on the market. The choice of QSR NVivo has been largely driven by the fact that there exists at Cranfield a group of researchers who are highly knowledgeable and competent in using QSR's software, including QSR NVivo and its predecessor, QSR NUD.IST.

The advantages of using such an analytical database are several. First, it avoids the need for a large paper-based filing system to accommodate coding since all the transcripts are held on the database. Secondly, NVivo stores the codes used to analyse the content of qualitative interviews as nodes on branches in a tree-shaped index system. The research design and main data collection method (semi-structured interviews) makes the use of such a package very appropriate, particularly as the interview questions themselves are based strongly on the conceptual framework. Thirdly, the index system in NVivo allows the organisation of codes into very general categories that can be related to the research question and/or conceptual framework. Sub-categories and codes can then be added to the index system as the coding and analysis proceeds. As the interviews are semi-structured they are especially suited to using a database package for analysis, since for example all the Global Account Manager interviews followed a similar structure, as did the set of customer interviews and the set of internal colleague interviews. NVivo also allows for a trail of evidence to be built up, which is important for validity (see paragraph 4.4.5).

The package also allows for *memoing* as the coding process progresses, something which is important when carrying out qualitative data analysis (Miles and Huberman 1994). Another advantage of the package is that it allows the coding of interview references for attributes such as organisation, job title, length of time in the role etc that emerge from the interviews. This allows for searches to be conducted against these attributes as well as against constructs and interviews sets (see below). The attribute data for this study are discussed further in paragraph 5.3.

One particular feature of NVivo is that it stores the portions of text that are allocated to a code as *text units*. These text units are the coded elements that the software programme uses as units within the database. Various reports are then available which enable text units to be retrieved for further work and analysis. It also allows

text unit counts for each node. Although the counting of text units can amount to a quantitative analysis of what is essentially qualitative data, which in turn raises questions in respect of validity, Miles and Huberman (1994) support the use of such approaches. Yin (1994) also suggests '*counting the countable*', whilst cautioning that quantitative analyses may be difficult, because of the inherently small sample sizes in case study research. Nonetheless, Lee (1999) advocates that methods of categorical data analysis should be employed when feasible. The counting of text units, (or character and word counts), allows for the weighting and ordering of qualitative data (Lee 1999) which is particularly useful when dealing with the number of categories that form the role constructs in this project. However, Easterby-Smith et al. (1999) say that in qualitative research, there is continual tension underneath the research process between creating meanings and counting frequencies, and caution that the availability of computer analysis may lead to an emphasis, if not careful, on counting the frequency of categories, at the expense of understanding the quality of the ideas and experiences. On balance, however, the ability to weight and order the role constructs was helpful.

Another key feature is that, while it stores each interview as a separate entity on the system, it is possible to make up *sets* of documents. For the purposes of this study sets were made for *each case study* and *each respondent group*. This then allowed individual role construct nodes to be explored on an individual respondent basis, on a case basis and on a respondent group basis. Node reports can be generated (see Appendix 4). Over 250 node reports were generated for the data analysis for this study.

The advanced features of the NVivo data analysis package, which QSR claim can be used for theory building and modelling, were not used by the researcher.

Other advantages described by Tesch (1989) of using a computer analysis package are that it can reduce analysis time, cut out drudgery, make procedures more systematic and explicit, ensure completeness and refinement and permit flexibility and revision in analysis procedures. Computing can move studies beyond *the 'handicraft production'* that has characterised much of qualitative research and is particularly useful for case researchers (Ragin and Becker 1989). However, while a computer

package has many advantages in helping the analysis of qualitative data, the '*task of theory discovery remains for the human researchers*' (Richards and Richards 1994).

4.4.5 Judging the Quality of the Design

Lincoln and Guba (1985) suggest there are four questions a researcher needs to address:

- (1) How do we know we have confidence in the findings?
- (2) How do we know the degree to which the findings apply in other contexts?
- (3) How do we know the degree to which the findings emerge from the context and the respondents and not solely from the researcher?
- (4) How do we know the degree to which the findings would be repeated if the study could be replicated in essentially the same way?

These issues can prove to be very problematic for qualitative and case study researchers, not least because they are the sorts of questions that quantitative studies are designed to address. Yin (1994) identifies four tests that have been commonly used to establish the quality of any empirical social research, which he suggests are also relevant to case study research. The four tests are *construct validity*, *internal validity*, *external validity* and *reliability*.

Construct validity is about establishing correct operational measures for the concepts being studied. Construct validity can be increased in case study research through the use of *multiple sources of evidence*. It can also be increased through using key informants to *validate the data post-analysis*. This study adopted both these tactics as described by Yin (1994). The study utilised multiple sources of evidence for the role constructs, in terms of having four different respondent group perspectives on the same set of constructs. Feedback sessions were also held with each case study organisation, where their within-case analysis was presented to them, in order to further qualify the constructs. Construct validity can also be increased through establishing a *chain of evidence*. For this study, all the data is catalogued and recorded.

Internal validity is about establishing a causal relationship, whereby certain conditions are shown to lead to other conditions, as distinguished from spurious relationships. In positivist research, the internal validity is achieved by the extent to which changes in a dependent variable can be attributed to controlled variation in an independent variable (Lincoln and Guba 1995). Yin (1994) suggests that internal validity is only of concern for causal or explanatory case studies and thus is not applicable to this study which is largely exploratory. However, the aim of Realism research is to discover knowledge of the real world by naming and describing broad, generative mechanisms that operate in the world (Healy and Perry 1998). They suggest that the desire of Realism research is to develop a '*family of answers*', that cover several contingent contexts and different reflective participants. Realism affirms that truth about a family of answers that can be known, albeit imperfectly (Healy and Perry 1998). They refer not to internal validity but to *contingent* validity; validity is about generative mechanisms and the contexts that make them contingent (Healy and Perry 1998). This has been the output from this study.

External validity is concerned with establishing the domain to which a study's findings can be generalised. External validity can be increased through the use of multiple case studies and adopting what Yin (1994) refers to as *replication logic*. The research has been conducted in this way.

Reliability is concerned with demonstrating that the operations of a study, such as the data collection methods, can be repeated, with the same results. Reliability can be enhanced through thorough documentation of the case research, which can be done by developing a *case study protocol* and by developing a *case study database*. Both these were developed for the research, broadly following Yin's suggestions for how these should be constructed. Further, each case study was conducted in as similar way as possible in terms of the interview protocols and information given to respondents.

The quality of the study was further enhanced by following much of Eisenhardt's (1989) roadmap for generating theory from case study research (see Figure 4.5). Critical points on this roadmap both support and supplement Yin's criteria for

enhancing the validity and reliability of case research. The ticks indicate where this research has followed the roadmap.

Healy and Perry (1998) propose a set of *quality criteria* specifically related to case study research within the Realism paradigm. Drawing on the three elements of *ontology*, *epistemology* and *methodology*, they develop six criteria for judging Realism research. Their criteria are shown in Figure 4.6. Their criteria also makes a comparison with Yin (1994). This study is also one that can be judged against these criteria. One of the criteria they suggest for judging the quality of the research is published reports for peer review. Reports of this research have been published for peer review (Holt and McDonald 2001b).

A roadmap of the overall data analysis design is at Figure 4.7.

Figure 4.5 Eisenhardt's (1989) Roadmap for Case Study Research

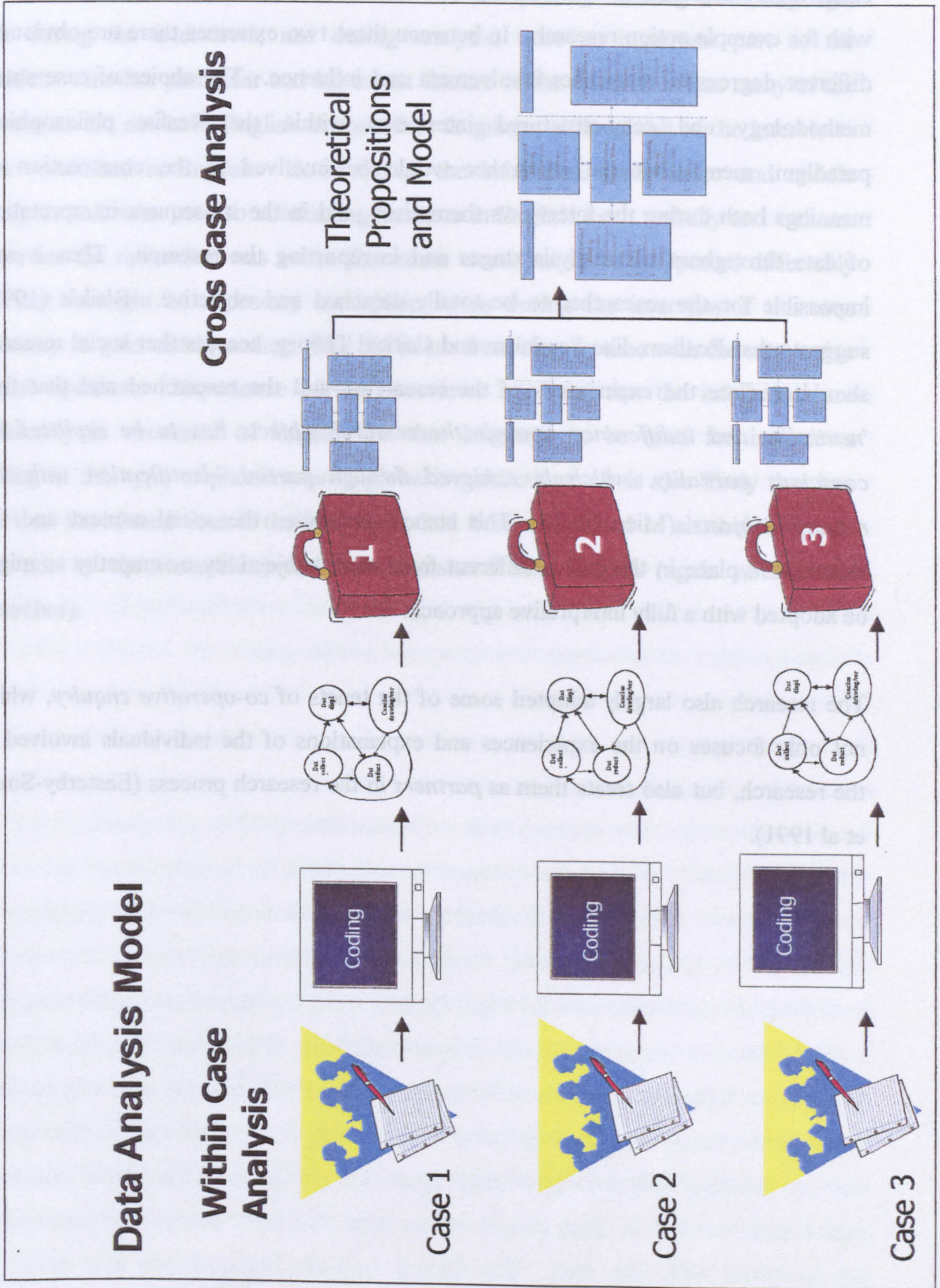
STEP	ACTIVITY	REASON
Getting started	√ Definition of research question	Focuses efforts
	√ Possibility of a priori constructs	Provides better grounding of construct measure
Selecting cases	√ Neither theory of hypothesis	Retains theoretical flexibility
	√ Specified population	Constrains extraneous variation and sharpens external validity
	√ Theoretical, not random sampling	Focuses efforts on theoretically useful cases - ie those that replicate or extend theory by filling conceptual categories
Crafting instruments and protocols	√ Multiple data collection methods	Strengthens grounding of theory by triangulation of evidence
	Qualitative & quantitative data combined Multiple investigators	Synergistic view of evidence Fosters divergent perspectives and strengthens grounding
Entering the field	√ Overlap data collection and analysis, including field notes	Speeds analysis and reveals helpful adjustments to data collection
	√ Flexible and opportunistic data collection	Allows investigators to take advantage of emergent themes and unique case features
Analysing the data	√ Within-case analysis	Gains familiarity with the data and preliminary theory generation
	√ Cross-case pattern search using divergent techniques	Forces investigators to look beyond initial impressions and see evidence through multiple lenses
Shaping hypotheses	√ Iterative tabulation of evidence for each construct	Sharpens construct definition, validity, and measurability
	√ Replication not sampling logic across cases	Confirms, extends and sharpens theory
	√ Search evidence for 'why' behind relationships	Builds internal validity
Enfolding literature	√ Comparison with conflicting literature	Builds internal validity, raises theoretical level, and sharpens construct definition
	√ Comparison with similar literature	Sharpens generalisability, improves construct definition and raises theoretical level
Reaching closure	Theoretical saturation when possible	End process when marginal improvement becomes small

Figure 4.6 Quality Criteria for Case Study Research Within the Realism Paradigm

a.	Developed for this paper	Brief description of criteria for realism research	Case study techniques within the realism paradigm	Criteria for case research
b.	Major authors			Yin (1994)
c.	ONTOLOGY 1. Ontological appropriateness	Research problem deals with complex social science phenomena involving reflective people	Selection of research problem e.g. it is a how and why question	
d.	2. Contingent validity	Open, 'fuzzy boundary' systems (Yin 1994) involving generative mechanisms rather than direct cause-and-effect	Theoretical and literal replication, in depth questions	Internal validity
e.	EPISTEMOLOGY 3. Multiple perceptions of participants and of peer researchers	Neither value-free nor value-laden, rather value aware	Multiple interviews, supporting evidence, broad questions before probes, triangulation. Published reports for peer review	
f.	METHODOLOGY 4. Methodological trustworthiness	Trustworthy - the research can be audited	Case study database, use of quotations in report	Reliability
g.	5. Analytic generalisation	Analytic generalisation (that is, theory-building) rather than statistical generalisation (that is - theory testing)	Identify research issues before data collection to formulate interview protocol	External validity through the specification of theoretical relationships, from which generalisations can be made
h.	6. Construct validity			Construct validity

Adapted from Healy and Perry (1998)

Figure 4.7 Data Analysis Model



4.5 RESEARCHER INVOLVEMENT AND INFLUENCE

As already discussed, there is a choice to be made about the degree of involvement and influence of the researcher. At the extremes, it is possible for the researcher to be either highly detached as in for example, scientific experiments, or highly involved, as with for example action research. In between these two extremes there are obviously different degrees of researcher involvement and influence. The choice of case study methodology and semi-structured interviews within the Realist philosophical paradigm, meant that the researcher would be involved in the construction of meanings both during the interviews themselves, and in the subsequent interpretation of data throughout the analysis stages and in reporting the research. Thus it was impossible for the researcher to be totally detached and objective. Blaikie (1993) suggests that Realism, like Feminism and Critical Theory, accepts that social research should mediate the experiences of the researcher and the researched and that that *'neutrality and indifference towards the research objects has to be replaced by conscious partiality, which is achieved through partial identification with the research objects'* (Mies 1983). This stance recognises the social context and the researcher's place in this but is different from mere subjectivity or empathy as might be adopted with a fully interpretive approach.

The research also largely adopted some of the tenets of *co-operative enquiry*, which not only focuses on the experiences and explanations of the individuals involved in the research, but also treats them as *partners* in the research process (Easterby-Smith et al 1991).

4.6 THE ROLE OF LANGUAGE

Language was a factor in the study, as semi-structured interviews were used as the main data collection method. This means that interpreting meaning from language, both during the interviews, and during analysis, were an important part of the research. Another particular and important feature of the research is that many of the informants did not have English as their first language, although all of the interviews were conducted in English. However, all the informants were senior and middle managers and were used to conducting business in English, both verbally and written. However, the researcher was aware that some words might be interpreted differently and that it might be necessary to explain terms during the interview if this was necessary to gain understanding. This did occur from time to time with the non-native English speakers. Experience of the interviews has been that the informants are sufficiently in command of English for that language to be used for interviews looking at this type of phenomena in global organisations. It is also likely that less bias was introduced than if the interviews had been conducted in another language (and not by the researcher) and then translated into English (again not by the researcher).

4.7 THE DATA COLLECTION PHASE OF THE RESEARCH PROJECT: IN PRACTICE

4.7.1 The Three Participating Organisations

Due to time and access constraints, it was decided that all three target organisations would be approached at the same time. This strategy would also hopefully facilitate their agreement, as they would be able to see that some of the output from the research that could be beneficial was the cross-case analysis. For them, this would take the form of exchange of best practices and benchmarking.

Approaches were made to the three key senior people in the three target organisations. These people were either responsible for the Global Account Management programme or heavily involved in its management. In line with Yin's (1994) case study protocol, a statement about the project was prepared which gave a background to the study, its purpose and objectives, expected involvement of the case organisations, benefits of the research and expected output (see Appendix 5). Meetings were held face-to-face with two organisations, which will be referred to as ConsultancyCo and ManufacturingCo and by telephone with CourierCo. As a result of these meetings, all three organisations agreed to take part.

Each senior manager was asked to provide a *champion* for the research within their organisation, either themselves or someone who would be prepared to provide a liaison point within the organisations. Gummesson (2000) points out that it is essential to identify *gatekeepers* who can open the gate for the researcher. This was felt to be important given the global nature of the research and the fact that much of the interaction with the researcher would be by telephone and e-mail. In terms of identifying whom to interview for each dyad, a senior manager was asked to identify a Global Account Manager who could be interviewed. This is following the tradition of using *key informants*, described by Gummesson (2000) as those who can provide valuable information and smooth the way for others. At this interview, the Global Account Manager was asked to suggest one or two people from their customer organisation and two or more people within their own organisation who represented key interfaces with their role. The Global Account Manager was then asked to

facilitate setting up the interviews. Each person approached was given a copy of the project statement.

It is important to note that most of the respondents fell into the category of what Marshall and Rossman (1999) describe as *elite* individuals. The consequence of this for the researcher is that they often need to rely on introductions and sponsorship for assistance in getting interviews with elites. Thus, the process of obtaining interviews through the auspices of the Global Account Manager would appear to be a legitimate research strategy.

The interviews were set up largely by e-mail as the main means of communication before and, if necessary, after the interview. The informants were asked to suggest a set date and time for the interview that was convenient for them and they had copies of the appropriate interview protocols sent to them so that when the interviews were conducted (especially those by telephone), the informant had the same protocol in front of them as the researcher. This was particularly helpful with the remote interviews, as it gave a structure to the interview and focused it.

For the customer interviews, a further project statement was prepared (see Appendix 6) which explained the project to the customer informants from their perspective. Informants stated that this was helpful in making their decision to respond positively to the request to be interviewed.

All the informants (or respondents) agreed to their interviews being taped, whether face-to-face or by telephone. While the researcher had concerns about the quality of the tape recordings of international telephone conversations, in fact the reality was that they could be clearly heard and transcribed. However, notes were also taken during the interviews in case anything went wrong with the recordings, which in four cases, it did. Before the start of each interview, the informants were asked if they understood the purpose of the research project and were given an opportunity to ask any questions about the overall project. The informants were also assured that they would not be personally identifiable in subsequent written and verbal reports.

There were few problems with the interview protocols in terms of informants understanding the questions, although where asked, the researcher explained and clarified. Equally, the researcher used clarification and summarising techniques where it was thought to be appropriate.

Interviews were transcribed initially by the researcher and then, due to time constraints, by an independent transcriber. The data was then analysed using the NVivo software as described above.

In terms of the timing of data collection, Case study 1 was largely completed before the fieldwork began on the other cases. However, data was collected from the other three case studies concurrently and not sequentially. As this was not the type of case study where the data was analysed before going on to the next case study, this was not felt to be inappropriate given this study's research design.

4.7.2 Issues with the Fieldwork and Subsequent Changes to the Research Design

During the data collection phase of the PhD project, a number of difficulties occurred which necessitated some changes to the original research design. These difficulties were caused by:

Needing to find two replacement case studies

ConsultancyCo deciding to re-organise itself and make a significant number of its senior partners and partners redundant. This resulted in the research champion departing the organisation and the organisation deciding that it was an inappropriate time to take part in the research. However, the main *organisation* level interview had been carried out. A year later they re-joined the Cranfield Key Account Management Club and expressed an interest in re-joining the project. However, after a number of further meetings, they again frustratingly decided that it was not the right time.

At the same time, the champion at ManufacturingCo was moved to an entirely different job and his successor, after deliberating for some considerable time, decided that the time was not right for them to take part in the research.

Four more organisations were approached. Two agreed to take part in the full project and two agreed that the researcher could interview some key people in their organisations about their Global Account Managers, but did not feel they could commit to the whole project, or were uncomfortable in facilitating access to their customers. These interviews have now been included as part of the data collection. The two further case organisations were ComponentsCo and ComputerCo. The other two organisations were AutomotiveGlassCo and LiquidGasCo.

Inability to complete three full relationships for each case

The original research design was to collect data from three global relationships in each case study. In the case of CourierCo, it proved impossible to complete a full set of interviews in one of the relationships, in spite of considerable effort by the researcher to complete the interviews. However, it was felt that in order to provide sufficient data for the project, a fourth case organisation should be approached. EquipmentCo agreed to take part and provided access to one of their key global relationships.

Figure 4.8 Final Research Design

Case Study 1: CourierCo	
Relationship 1:	<i>Interdependent</i>
Relationship 2:	<i>Interdependent</i>
Case Study 2: ComputerCo	
Relationship 3	<i>Interdependent</i>
Relationship 4	<i>Interdependent</i>
Relationship 5	<i>Interdependent</i>
Case Study 3: ComponentsCo	
Relationship 6	<i>Interdependent</i>
Relationship 7	<i>Interdependent</i>
Relationship 8	<i>Interdependent</i>
Case Study 4: EquipmentCo	
Dyadic Relationship 9	<i>Interdependent</i>

The final research design is in Figure 4.8 and the final interview set is in Figure 4.9.

Figure 4.9: Final Interview Set

CASE STUDY 1			
Organisation Interview x 1	GAM 1	Customer x 2	Internal x 2
	GAM 2	Customer x 2	Internal x 2
Total: 1	2	4	4
CASE STUDY 2			
Organisation Interview x 1	GAM 3	Customer x 1	Internal x 2
	GAM 4	Customer x 1	Internal x 1
	GAM 5	Customer x 1	Internal x 1
Total: 1	3	3	4
CASE STUDY 3			
Organisation Interview x 2	GAM 6	Customer x 1	Internal x 2
	GAM 7	Customer x 1	Internal x 1
	GAM 8	Customer x 1	Internal x 1
Total: 1	3	3	4
CASE STUDY 4			
Organisation Interview x 1	GAM9	Customer x 2	Internal x 1
Total: 1	1	2	1
TOTAL INTERVIEWS			
Organisation x 5	GAM x 9	Customer x 12	Internal x 13
OTHER INTERVIEWS			
	AutomotiveGlassCo x 1	LiquidGasCo x 3	ConsultancyCo x 1
	1		

4.8 SUMMARY OF CHAPTER 4

Chapter 4 has presented the research methodology for the project and explained how the data collection and research design were actually managed in practice. Chapter 5 now takes the first case study and explores the key findings from the analysis of the data

CHAPTER 5: CASE STUDY 1: COURIERCO

5.1 CASE STUDY 1: RESPONDENT INTERVIEWS

This chapter contains the within-case analysis of the data from the first case study; CourierCo. The respondents in this case by type of interview are shown in Figure 5.1.

Figure 5.1: Case Study 1 Respondents: Type of Interview

CASE STUDY 1						
Type of Interview by Respondent Type	Interview Location	Medium	Length	Recording of Interview	of	Transcribed
Organisation Interview 1	Brussels	Face to Face	2.5 hours	Tape		Yes
GAM Interview 1	Brussels	Face to Face	2 hours	Tape		Yes
GAM Interview 2	London	Face to Face	2 hours	Tape		Yes
Customer Interview 1.1	Germany	Telephone	1 hour	Tape		Yes
Customer Interview 1.2	Ireland	Telephone	1 hour	Tape		Yes
Customer Interview 2.1	France	Telephone	45 mins	Tape		Yes
Customer Interview 2.2	USA	Telephone	55 mins	Tape		Yes
Internal Interview 1.3	Finland	Telephone	1 hour	Tape		Yes
Internal Interview 1.4	Hong Kong	Telephone	50 mins	Tape		Yes
Internal Interview 2.3	London	Face to Face	1 hour	Tape		Yes
Internal Interview 2.4	USA	Telephone	1 hour	Tape		Yes
Total: 11		4 face to face	14 hours	All		All
		7 telephone				

5.2 CASE STUDY BACKGROUND

CourierCo was the initial case study in the project. CourierCo is a major global player in the logistics and courier market operating in over 220 countries worldwide. CourierCo has been running with both a Key Account Management and a Global Account Management programme for some years. In 1993 they initially set up the basis for the current programme by identifying those customers who had global needs and who were expressing a requirement for a global service from their suppliers:

'it is definitely driven by customers...they want to be seen as a global customer and they want to be treated as a global customer'

Org1

At the time of the interviews (2001) there were 28 global customers, known as *global advantage customers* (GACs), and 5 banks which were treated differently from the other 28. These GACs were grouped into 8 defined industry sectors and each of them had a Network Global Account Manager (NGAM) with total responsibility for managing the customer on a 1:1 basis. The industry sectors were, for example, precision engineering, pharmaceuticals, high technology, automotive, banks and other financial institutions. The NGAMs were supported by a centrally organised global support group based in its own building in Brussels providing information systems, pricing strategies, administrative help and services back-up. However, each NGAM reported directly into their appropriate industry head. They did not report into any kind of sales structure. Typically, but not always, the NGAMs live and work close to the head office of their GAC.

'Typically these NGAMs will live and work and sit close to the head office of that organisation. So for example our Philips NGAM sits in the Netherlands because that is the biggest site and where the decision makers for Philips are on a global level is in the Netherlands, so that's pretty typical. With Siemens, for example, our NGAM is in Germany... ..so that's the way they work but they'll have a virtual team working out of that area.'

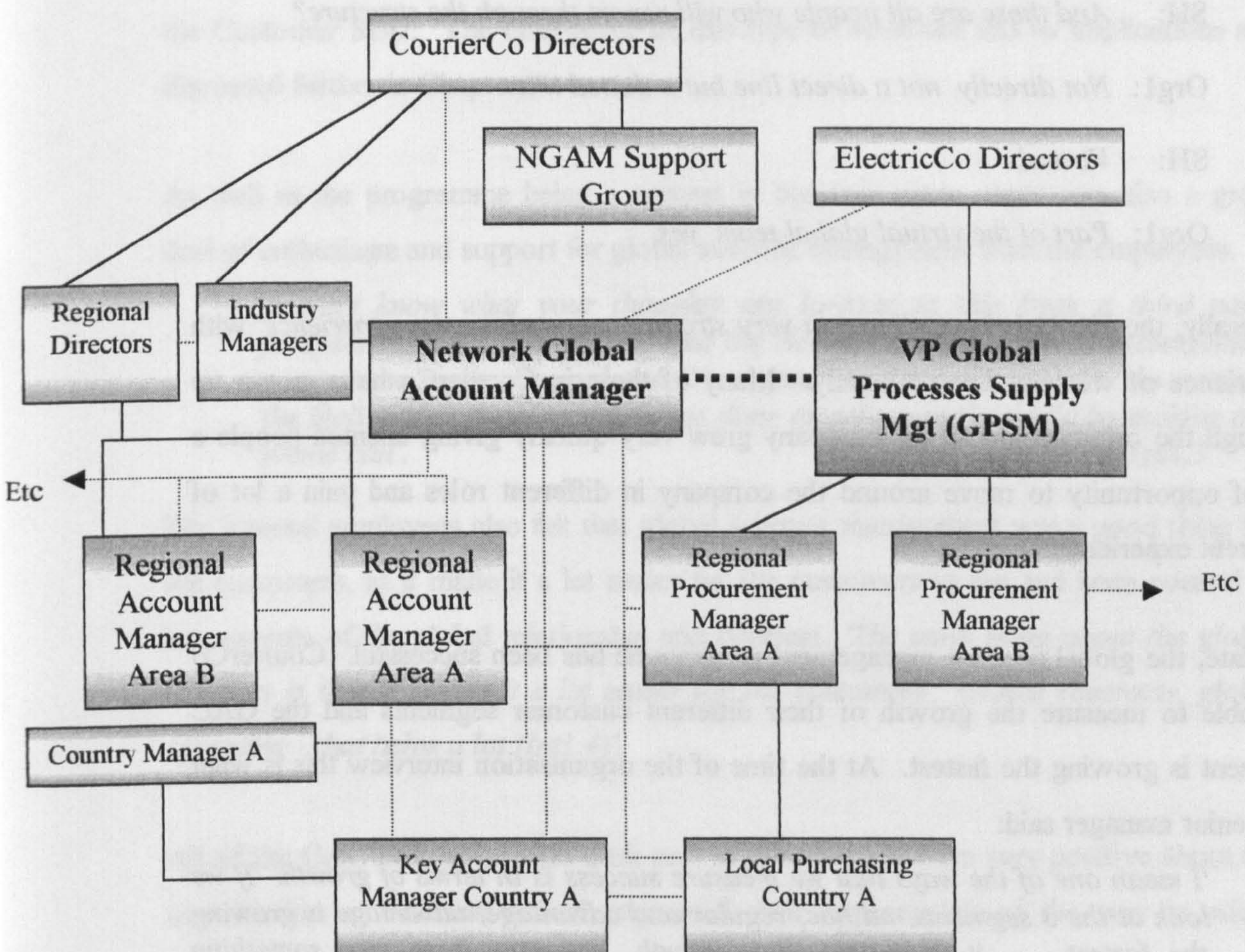
Org1

CourierCo also have a regional geographical set-up in terms of servicing customers. So for the four super regions (Europe and Africa, United States, International Americas and Asia Pacific) there would be a Regional Global Account Manager (RGAM) working closely with the specific GAC. Then, for each country there would be a Key Account Manager appointed for the customer to manage the relationship at local level. The RGAM would report into the Regional Director and the KAM into

the country manager. However, the RGAMs and KAMs have a *dotted line* reporting into the NGAM.

A typical organisation structure for managing a GAC is in Figure 5.2. The reporting relationships are represented by the unbroken lines, and the key relationships by the dotted lines.

Figure 5.2: A Typical Organisation Structure for Managing a Global Advantage Customer at the Time of the Interviews



As well as the NGAMs, RGAMs and KAMs, there are teams providing operations support and customer services support. These people also form part of the *virtual global team*:

Org1: *'No, there are a lot of other members of the team that you may have. Operations support definitely and you have customer services support as well. Those are probably the two big ones. There is a lot of support needed for these large accounts, so there is a support structure which is in place today. And, in fact, we are now, as part of this reorganisation, optimising that. So, we will actually have a sales support, a global sales support function ... so the current situation is that you have the GAMs, RGAMS, key account managers and they will also have support in terms of customers services, operations and I think that's it.'*

SH: *And those are all people who will report through the structure?*

Org1: *Not directly, not a direct line but a dotted line.*

SH: *Virtual.*

Org1: *Part of the virtual global team, yes.*

Generally, the NGAMs have all had '*a very strong commercial sales experience*' with experience of working internationally. Many of them in CourierCo have grown up through the organisation as the company grew very quickly giving talented people a lot of opportunity to move around the company in different roles and gain a lot of different experience.

To date, the global account management programme has been successful. CourierCo are able to measure the growth of their different customer segments and the GAC segment is growing the fastest. At the time of the organisation interview this is what the senior manager said:

'I mean one of the ways that we measure success is in terms of growth. If we look at the 3 segments, ad hoc, regular and advantage, advantage is growing the fastest.it is double digit growth. You may have seen something already, but it is really growing fast and that's another reason why we've identified it [this segment] to expand it is because, it is, and we are, growing so fast. So, we are measuring success in terms of revenue, in terms of profit, because we also believe it's a very profitable segment - its great.'

Org1

At the time of the interviews the company was just about to reorganise its global account management programme. While the programme had been a success, it was time to expand it:

'You are actually coming in at an interesting stage within [CourierCo]. We have been very successful with our global account programme. So successful that we now want to expand it.'

Subsequently, the organisation took 15 Network Global Accounts and created an Independent Business Unit (IBU) as a separate organisation for these accounts. The IBU consisted of dedicated support teams focusing on individual global accounts. This was the first example that the researcher had found of a truly customer-focused strategic business unit structure with the NGAM taking on the role of the Director of the Customer SBU. The emergence of this type of structure and its implications are discussed further in Chapter 9.

As well as the programme being a success in business terms, there was also a great deal of enthusiasm and support for global account management from the employees.

'I don't know what your thoughts are looking at this from a third party perspective, but I can tell you that the Network Global Account Management programme is phenomenal and it's a great programme. It gives the account the feeling that they can get things done anywhere in the world by making one phone call.'

Int2.3

The internal employees also felt that global account management was a good thing for the customers, as it made it a lot easier for the customers to see and keep control of key aspects of the global relationship and contract. *'The main thing about the global contract is that it makes it a lot easier for the customers. Global contracts, global reporting - that helps a lot (Int1.4).'*

All of the GAC customers who took part in the research were very positive about the contribution of CourierCo, and expressed their appreciation of the way in which CourierCo had been running their global account management activities. One went so far as to say, *'I don't think we could do without a global account manager now (Cust2.1).'*

Finally, it is important to point out that CourierCo is seen as a leading organisation in terms of good practice in global account management. The Global Director

responsible for establishing and driving the programme is recognised by peers as an expert practitioner. He is in great demand for speaking at practitioner conferences, and at conferences such as those held by the Sales Research Trust (SRT), which is a joint academic and practitioner conference. Since the time of the interviews the Global Director has retired from CourierCo, although he has been retained on a consultancy basis for the global account management programme. He is now a Visiting Professor at a leading European business school, and is carrying out consultancy for a number of blue chip organisations who are implementing global account management. The organisation has also been used as a case study example of global account management structure and positioning (e.g. Millman and Wilson 2001).

Of the four cases studied in this project, CourierCo is the most advanced in terms of global account management structures and support systems. They also have the largest number of global accounts. As such, then, CourierCo could be construed as representing leading edge practice out of the four case studies. However, there is a danger of then making assumptions that the CourierCo global account managers themselves will therefore be representative as the leading examples in their field. In carrying out the research in the field, the researcher did not want to make such distinctions between the global account manager interviewees. This is because of the nature of the research, where the boundaries between the phenomenon being studied and the context are not clearly evident. The researcher has relied on the data to build a picture of what constitutes good practice in terms of the role of global account managers.

The selection of which global accounts and NGAMs would take part in the study was CourierCo's decision. They were asked by the researcher to suggest three relationships that they thought were good examples of global account management in practice. They responded by suggesting three of what they considered to be their top four global accounts. As was explained in Chapter 4, one of these did not in end, the take part in the project. The two global accounts that did were numbers 2 and 3 in terms of their most important global accounts.

5.3 CASE STUDY 1: RESPONDENT PROFILES

The NVivo data analysis programme allows attribute data to be stored about each respondent interview. Reports can then be generated against each attribute if required. The attributes for the respondents that were entered on the system for this project were:

Attribute	Sub-Attribute Look-up Code
Case	CourierCo
	ComputerCo
	ComponentsCo
	EquipmentCo
	GasCo
	AutomotiveGlassCo
	ConsultancyCo
	Organisation
Respondent Type	GAM
	Customer
	Internal
	Male
Gender	Female
	As Expressed by Respondent
Job Title	As Expressed by Respondent
Main Job Location	As Expressed by Respondent
Nationality	As Expressed by Respondent
Time in Current Job	As Expressed by Respondent
Age	As Expressed by Respondent
	(Customers were not asked their age)

For case study 1, the attribute data for the respondents is shown in Figure 5.3

Figure 5.3: Case Study 1 Respondent Profiles: Attribute Data

CASE STUDY 1							
Respondent Type	Work Location	Nationality	Gender	Job Title		Time in Current Job	Age
Organisation Interview 1 <i>Org1</i>	Brussels	Belgian	Male	Director Support	Global	2 years	36
GAM Interview 1 <i>GAM1</i>	Germany	Swedish	Male	Network Account Manager	Global	3 years	37
GAM Interview 2 <i>GAM2</i>	UK	British	Male	Network Account Manager	Global	3 years	40
Customer Interview 1.1 <i>Cust1.1</i>	Germany	German	Male	Director	GPSM	2 years	X
Customer Interview 1.2 <i>Cust1.2</i>	Ireland	Irish	Male	Logistics Director		2 years	X
Customer Interview 2.1 <i>Cust2.1</i>	France	British	Male	VPOperations		4 years	X
Customer Interview 2.2 <i>Cust2.2</i>	USA	American	Female	VPOperations		1 year	X
Internal Interview 1.3 <i>Int1.3</i>	Finland	Finnish	Female	Key Manager	Account	2 years	32
Internal Interview 1.4 <i>Int1.4</i>	Hong Kong	Chinese	Female	Regional Manager	Account	3 years	41
Internal Interview 2.3 <i>Int2.3</i>	UK	British	Female	Operations Manager		2 years	35
Internal Interview 2.4 <i>Int2.4</i>	USA	American	Male	Regional Manager	Account	1 year	32
Total: 11	8 countries	8 nationalities	7 Male 4 Female				

Organisation Respondent

The organisation respondent was a senior manager in the core global account management support group based in Brussels. This small team reporting directly into the Global Director, who was a board level director, was responsible for policy development in respect of the global account management programme. This covered areas such as global sales support (e.g. customer reports, financial reports and global pricing policy), monitoring of global account plans, communications strategy, and building the GAM intranet and global customer extranet). They were also involved in

the rewards, development, training and appointment of global account managers. The organisation respondent was in a good position to provide information about the whole global account management programme at CourierCo. He had been working with the NGAMs and the Global Director for two years. He had been suggested as the key person to speak to by the Global Director.

Global Account Manager Respondents

GAM1 was based in Germany. He had been working for CourierCo for ten years. In that time he had worked in Sweden (his nationality is Swedish), Australia, Singapore, Middle East, Belgium and Germany. While he had mostly worked in a sales role, he had also worked as a country manager, a project manager and in operations. Although he had worked in a commercial environment for ten years, prior to that he had been a teacher, teaching biology and sports. He said *'I don't know how I have ended up here'*.

The customer of GAM1 is a large global precision engineering company operating in over 120 countries worldwide with its HQ in Zurich. They have been a key customer since 1989 when the first global contract was signed. The main contacts for GAM1 are located in Germany and Switzerland.

GAM2 is based in the UK. He had been working for CourierCo for six years. He was based in the UK and his nationality was British. Like GAM1, he had quite a broad background. Again, whilst working mostly in business development and sales roles he had also had experience in project management and logistics. Prior to joining CourierCo his experience had been mostly within the tobacco industry. He had worked all over the world and had experience of working with customers from Western Europe, Eastern Europe (e.g. Poland, Bulgaria), North Africa and the Middle East, Asia and more latterly, the USA.

The customer of the GAM2 is a major global technology and telecommunications company. The HQ of the company is in the USA but much of its operations are in the UK and Europe. GAM2 has chosen to be located in the UK, partly for personal reasons but also because it is easy to go both East and West from the UK.

One internal respondent gave her opinion about the position of the global account manager in CourierCo.

'My opinion about the global account manager is that it is a very important role, a very important person.'

Int1.3

Customer Respondents

For GAM1

Cust1.1 was a Global Processes Supply Director working at the Global Processes Supply Management (GPSM) division based in Germany, although he also spent a lot of time at his company's HQ in Zurich, Switzerland. He described his company as *'becoming more and more global'*. The company had identified those processes that had a *'commonality on a global level'*, for example, logistics, and had set up the GPSM division to manage these processes with suppliers who could provide a global solution for such processes.

Cust1.2 was a Logistics Director working at country level who was based in Ireland. He was responsible for all aspects of the logistics processes for the company in Ireland.

For GAM2

Cust2.1 was a VP Operations currently based in France. He was the person who had instigated the global relationship with CourierCo. His span of operation covered transportation and warehousing, plus systems and manufacturing for Europe. He was also involved in corporate planning and financial planning. He described this role as having *'the whole supply chain'*.

Cust2.2 was a VP Operations based in USA. His role was very similar to Cust 2.1 but he covered North America.

Internal Team Member Respondents

For GAM1

Int1.3 was a Key Account Manager based in Finland. She had worked for CourierCo for seven years. She had responsibility for managing the customer at country level.

Int1.4 was a Regional Global Account Manager based in Hong Kong and had worked for CourierCo for twenty years. She had responsibility for managing the global account across the Asia Pacific region.

For GAM2

Int2.3 was an Operations Manager based in the UK and had worked for CourierCo for nineteen years. She worked closely with the NGAM to ensure the operations were delivering against the global agreement for the customer.

Int2.4 was a Regional Global Account Manager based in US. He had worked for CourierCo for nine years. He had recently moved back there from the UK, where he had been a country level key account manager with responsibility for the global account in North America.

Having looked at the background to the global account management programme for Case Study 1 and at the profiles of the respondents, the role constructs for global account managers, as they emerged from the data analysis, are now presented and discussed.

5.4 COURIERCO ROLE CONSTRUCTS

The CourierCo role constructs that emerged from the analysis of the eleven CourierCo interviews are now explored. The CourierCo data was the first to be analysed and therefore set the basis of the coding structure against which the three other case studies were analysed. A full explanation of how the coding and analysis was carried out can be found in Chapter 4, paragraph 4.4.

A total of 311 text units were coded for CourierCo. However, not all of these were coded to the construct nodes. They were also coded to the *free* and *skills* nodes. The full nodes listing is at Appendix 3. As explained in Chapter 4, the NVivo programme allows the text units to be analysed a number of different ways. For the CourierCo within-case analysis a total of 45 individual node reports were produced from the database which were then further fine coded and categorised. An example of a node report can be found at Appendix 4.

In the following analysis, the role constructs that emerged from the data have been grouped into the five key areas of Goal-Focused Roles, Customer-Focused Roles, Internal-Focused Roles, Account Planning Roles and Spanning Roles that represent the top five tree nodes in NVivo. Within these five areas, the constructs are presented in an order that reflects their position in terms of the number of text units found per construct. Table 5.1 shows the number of text units per role construct in the CourierCo data analysis.

Each of the constructs are illustrated and explained by appropriate text units from the interviews, as is consistent with the reporting of qualitative data (Miles and Huberman 1994). This demonstrates how the understanding of the constructs can be enriched by the case data. Further tables, diagrams and spidergrams are used by way of further description and explanation as is also consistent with the reporting of qualitative data (Miles and Huberman 1994).

In the final section of the chapter the constructs are shown analysed against respondent group and the data displayed and discussed accordingly.

Table 5.1 CourierCo Role Constructs: Count By Text Unit

Role Construct	Text Unit Count	Respondent Group			
		Org	GAM	Cust	Int
Goal Focused	11	√	√		√
Financial	5	√	√		√
Non-Financial	3	√	√		
Personal	3		√		
Customer Focused	95	√	√	√	√
Understanding the Customer	25	√	√	√	√
Building Strategic Relationships	21	√	√	√	√
Developing New Ideas and Opportunities	20	√	√	√	√
Focal Point of Contact	12			√	√
Facilitating the Contract	9		√	√	
Exchanging Best Practice	8		√	√	
Internal Focused	98	√	√	√	√
Managing Internal Team	43	√	√	√	√
<i>Internal Team: Managing Team</i>	22	√	√	√	√
<i>Internal Team: Managing Virtual Team</i>	7	√			√
<i>Internal Team: Motivating Team</i>	14		√	√	√
Customer Advocate	10			√	
Exchange Best Practice Internally	10		√		√
Knowing Own Organisation	8	√		√	
Providing Support	7				√
Facilitating Contract	6		√	√	
Managing Political Environment	5	√	√		
Finding Opportunities	5				√
Internal Consultant	4		√		
Account Planning Focused	12	√	√		√
Account Planning	8	√	√		√
Making Business Cases	4		√		
Spanning Focused	44	√	√	√	√

Managing Communication	29	√	√	√	√
Managing Culture	15	√	√	√	√
Total	260	√	√	√	√

5.4.1 Goal-Focused Role Constructs

Goal-focused role constructs emerged from the CourierCo Organisation and GAM interviews and from one internal respondent, but were not mentioned by the customer respondents in this case study. NGAMs had specific targets and goals to achieve which were partly linked to the overall strategies for the GAC group of customers set by the *Global Change Review Board* and partly linked to specific customer strategies set by the industry head. The global account managers also set themselves their own personal goals. From the data, these goal constructs could be categorised into three different roles. From the comments, they could also be categorised as formal (set by the organisation and measured by them) or informal (things the NGAM wanted to achieve that did not form part of any formal system). These are illustrated in Figure 5.4

Figure 5.4 Typology of Goal Roles

Goal Type	Formal/Informal
Financial	Formal
Non-financial	Formal
Personal	Informal

Of these, the financial and non-financial goals were largely set by the organisation as described above, with the personal goals being set by the NGAMs for themselves.

Financial Goals

The key financial goals were about both growing the size of the business with the customer and about increasing profitability.

'Its absolutely all about growth.we have to look for growth and that has to be profitable growth. That is why part of my remit is to

design the systems that can give us key customer financial information'.
Org1

It was also about keeping the business secure and retaining the customer as well:

'Get as much business out of the customer as possible, maintain the business and make the business profitable. ...It's about security - keeping the customer rather than letting them go and walk.' GAM2

One internal team member saw the NGAM as having a goal to improve the profitability of the customer:

'I see him [GAM2] being responsible commercially for the business and negotiating the account in terms of improving our profitability on the business'.
Int2.4

Non-financial Goals

These were about developing new opportunities for future business and about the management of strategic joint projects with the customer. Both GAMs were involved in special projects with their customers and part of their success was measured on how well these projects were run and completed. For example, GAM1 had been working with the customer to cut out stock inventory for the customer and improve service times for *just in time* delivery. This had been achieved, the customer was extremely pleased (and mentioned it in his interviews), and the GAM had part of his bonus related to this achievement.

Personal Goals

The NGAMs also had personal goals that were not formal in the sense that they were not part of the formal objective setting and reward structures. These were things that the NGAMs wanted to achieve with or for their customer that were usually prefaced with the words such as *'Personally, I would like to.....'* or *' There are some things I would like to personally achieve.....'*. For example, GAM1 had a personal goal of *'keeping the customer happy'* and his key account managers:

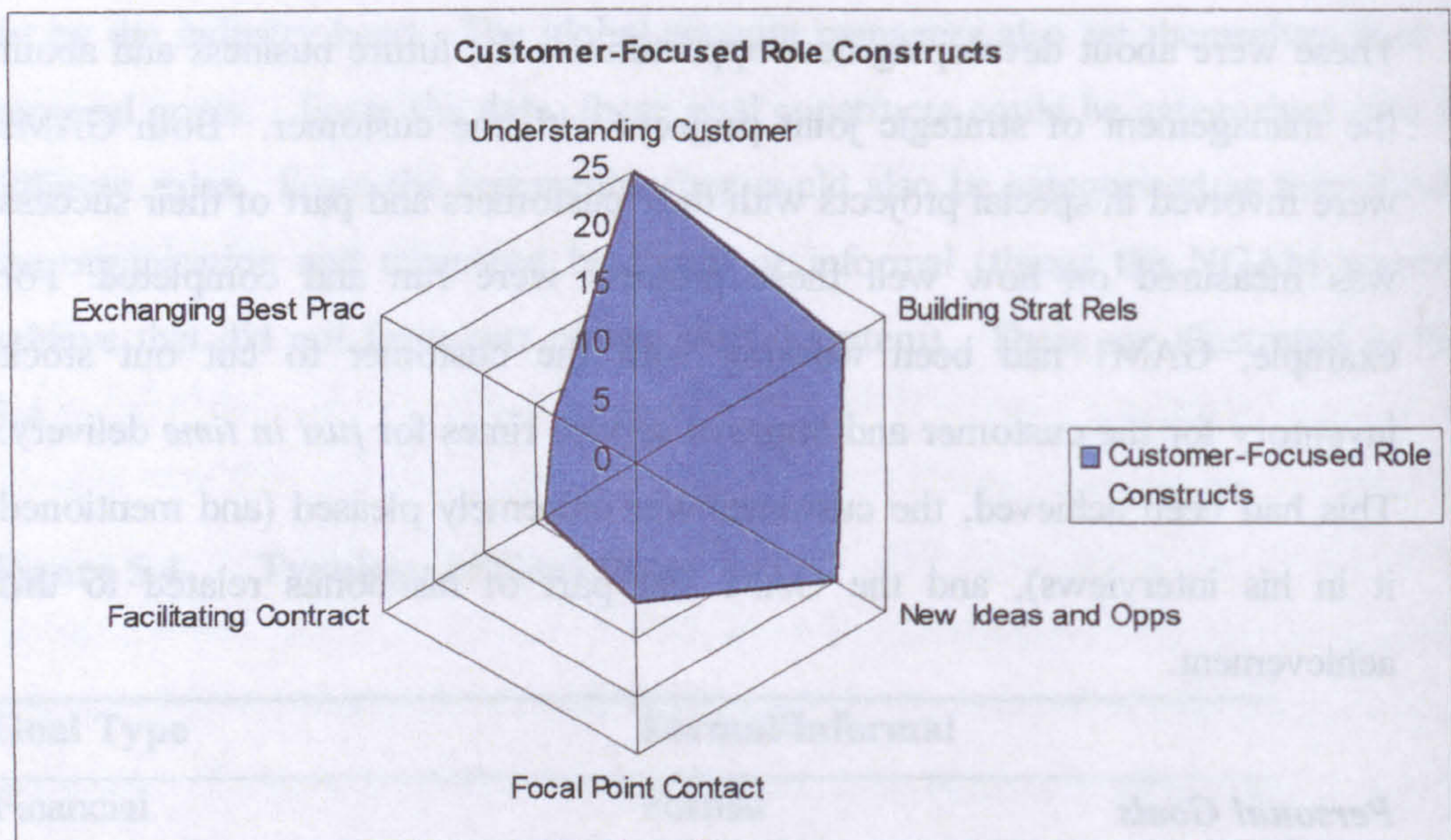
'So that's my internal goal, to spread the news, to let the key account managers take the lead themselves.'
GAM1

Another personal goal expressed by GAM2 was that he wanted to continue to keep 'a long-term perspective on the relationship with the customer'. This was something that he had worked hard to achieve and which he found to be of benefit in his dealing with, in particular, Cust2.1.

5.4.2 Customer-Focused Role Constructs

Having looked at the goal-focused constructs that emerged from the CourierCo interviews, the customer-focused roles are now analysed and discussed. The chart in Figure 5.5 represents the text unit count for each customer-focused construct.

Figure 5.5 Customer-Focused Constructs By Text Unit



Understanding the Customer

Understanding the customer was mentioned by all four respondent groups and in terms of text count was the most mentioned customer-focused construct. The NGAM was seen as the pivotal person in terms of having an in-depth customer understanding and insight.

Gathering information about the customer was mentioned several times. Developing an understanding of the customer and focusing on their specific problems and opportunities, was felt by both NGAMs to be an important part

of their role. This was not a superficial knowledge. This went beyond just knowing the customer well, to the ability to apply logistics knowledge and understanding to the customers' situations. It was also evident that the NGAMs needed to know their key people, the customer's key people, the different countries, the different industries and what the industry drivers were. Without putting effort into this part of the role, they could not be effective as a 'customer consultant'.

'Probably the most important one is to be able to listen to what - and listen through what - the customer says. To hear what they want to use [our] transportation for. Is it just really to get the package there, or is there some underlying targets that they have which they maybe can't even tell you - and things like that. So I think to listen and understand is very important.'

GAM1

'They definitely appreciate this the most - if you know your countries, you know your people. If you then know [the customer's] people, they feel very, very comfortable and then they open up. And that's the way they do business.'

GAM1

'Knowledge of their industry is extremely important. If you don't understand the industries that they are in, and you don't understand what is driving them, you aren't going to be able to drive your organisation to meet their requirements because they want different customised solutions'

GAM2

Customers also expressed the view that industry understanding, and in particular, supply chain understanding was extremely important:

'Well I think he needs to understand our industry. You know the semi-conductor industry is fairly complex...there's probably 20 or 30 major companies in the semi-conductor business and there's probably another 100 smaller companies. It's an industry that's kind of unique in a lot of respects, particularly in the supply chain. So, I think if you're going to be a key account manager for a semi-conductor company then you need to know at least a little bit about the industry. You need to know who the competition is, you need to know these kind of things.Specifically you know, we would hope that our account, our global account manager would understand their supply chain strategy. We would expect him to spend enough time with us and have enough intelligence and know how to understand what we were talking about when we talk about it'

Cust2.1

Knowing and understanding the customer's operations and how they do business is a role also articulated by the customers.

'You have to really know what is going on in all the countries to do the job properly. [GAMI] did this by having joint meetings between us and [CourierCo] in all the most important countries'. Cust1.1

'He has to be the one with the global perspective on our business. He has to have a broad horizon'.

Cust1.2

'He has to understand our business principles as the customer, what structure we have, the way we are working, and how the decisions are made. He also has to know all this of course for his own company, definitely, in order to manage this network and to enforce decisions and yes, to make people decide and work with him'. Cust1.2

The internal respondents also saw the NGAMs as being the people in a position to build an overall understanding of the customer, and to build an understanding of the customer's capabilities and of what might be of interest to customers.

'They should also be very good in practical understanding of our customers capabilities because there are some things in the countries that we cannot do. But at high level, at the global perspective we can do, and they should be very good at mobilising resources. Sort of like point the way that we should take.'

Int1.3

So a key area is having the vision and to understand the customer'.

Int2.3

'They need to understand the customer so that they know what is going to excite and interest the customer'.

Int2.4

There was also a view that in many respects the supplier organisation was in a better position to know and understand the customer than many people in the customer's organisation:

'A lot of the time we find out that the customer just doesn't know their company well enough and I can tell you more [about the customer] than a lot of people in their organisation'.

Int1.4

Linked to the above aspect was a concept identified by both the Org1 and GAM2 that suggested the NGAMs needed to almost become part of the customer's organisation:

'I mean really understand the business and understand very, very well the needs of the customer and almost put themselves in that company. A lot of times and its almost like a blur, is which side of the fence is the NGAM on - is it on the customer side of the fence or our side of the fence? I think what's really important for them to be successful, is that

they can almost be seen as part of that company's organisation and some of them are like that, definitely.' Org1

'I think you do need to understand the customer's business and you need to almost get yourself into thinking you are being employed by the customer so that you can really understand what they're doing. Then you take that information back and, look at it from how am I going to make that business better and come up with solutions for the customer.' GAM2

It was also something that one of the customers identified:

What we're really looking for is a global account manager who really, you know is part of us and sees himself as wearing two hats. You know [CourierCo] pay me but [the customer] pays CourierCo to pay me. So, I guess in a nutshell that's really what we look for and they are not easy to find'. Cust2.2

Building Strategic Relationships

Another role construct identified is that of the strategic relationship builder.

There were sub-themes to this construct as well:

- *Building multi-level relationships*
- *Building long-term relationships*
- *Building a partnership relationship*
- *Building trust and openness*
- *Building global relationships*

While a requirement for negotiating global contracts was on a job description shown to the researcher by GAM1, this was not specifically mentioned in the interviews at all from the NGAM respondents. One explanation for this is that both relationships were well-established long-term relationships and had already been through the strategic negotiation phase. However, this aspect of the role was expressed by an internal team member:

'I think the global account manager's role is very strong of course, in building relationships not only in Finland, but also in the other countries.I see them as the sort of person to build the relationship at the strategic level.they do the high level negotiation.' Int1.3

What emerged was that the NGAMs now had a role to play in building a relationship with customers that was more of a *partnership*. This involved

building relationships with key people in the customer organisation at both strategic and operational levels, but they also needed to be facilitating relationships between people in the customer and people in their own organisation:

'We want GAMs that can build this partnership relationship. It is a lot about building relationships.' Org1

'It is good for the global account manager to have a good network and he has to be able to build a good network and a strong network around him on both sides.' Int1.3

This is also not simply about building *multi-level relationships* at all levels between the two organisations, but also about *building trust and openness* in order for the relationship to be effective:

'You've got to have a good degree of trust on both sides if you want to achieve the best solutions. They've got to be open and you've got to be open particularly when disclosing information about each other's activities...in times of recession when their business is going down, you need to be aware of what's going on, so that you can scale down your business as theirs is going down, and discuss plans to bring it back up when forecasts are better. They've got to disclose internal information they would not normally disclose to a supplier.' GAM2

'And they find the trust at the high level of communication with the senior management team.' Int1.3

In building the strategic relationship the NGAM has to be able to operate at a senior level and command respect in order to operate successfully and thus make things happen:

'He has to have good arguments for getting people on side and convincing them. This person has to be able to command respect from senior people so they have to know the business.' Cust1.1

Building the global relationship was seen as an important NGAM role with one customer describing it as the *absolute role*:

'So we were looking for [GAM2] to proactively globally co-ordinate everything for us.' Cust2.1

'I think a global account manager's absolute role is to overcome all of that and bring a sense of, you know, hey this is one account, it's truly global. You know Bangkok we don't want you doing this and Singapore you doing this a different way, and United States you've got

to work with Bangkok and Singapore to make sure that things don't fall down a crack in the middle. I mean it's a huge role, huge role of global co-ordination'. Cust2.2

'He can talk to anyone within [the customer] and I think the global co-ordination is also bringing good value to the customer'. Int1.4

Team members also described the NGAM role in terms of operating at a strategic and global level and that this was where the NGAM's relationship building focus was concentrated:

'I think firstly they have to establish the global link with the customer. Provide information about major organisational changes or updates and ideally, if they can, well establish something like a global agreement, contractual agreement or endorsement from the centre which will help us to put through any business discussion at a regional and country level. And of course he will be the one who has the global strategy and direction to help us to penetrate into the [customer's] business at both general country level and at local level.' Int1.4

Developing New Ideas and Opportunities

Again, all four respondent groups contributed to this construct. Similar to the previous two constructs, there were a number of sub-themes underpinning *developing new ideas and opportunities*. The four key sub-themes were:

- *The GAM as visionary*
- *The GAM as customer consultant*
- *The GAM as innovator*
- *Developing common business opportunities*

Both NGAMs saw *the GAM as customer consultant* as a major part of the role. Both had been involved in the negotiation of global framework agreements with the customer and were concentrating on moving these forward. They both described this part of the job as also being like a *consultant*.

*'The good thing with [the customer] is that they are very open for discussion. You can have any discussion with them more or less. So we actually put up logistics strategies together with them jointly. So we act as a consultant. And this has been a struggle in the beginning to make them believe that we don't want to change everything for the better of [us], but for the win-win of both of us.... So, I think that's where I spend most of my time - to consult for and with them.'*GAM1

'One of our strengths is that we are very flexible as an organisation and [this allows me] to use [the customer] for pilot development of some new products. In a way, I am acting like a consultant...we are doing different things with [the customer] to keep them ahead of the game.'

GAM2

'You've got a lot of balls up in the air and you're juggling them all the whole time. It's keeping your co-ordination across the globe. It's making sure that when you've got something new to develop, you've got the right team there, and getting the message out to everybody, being able to change at the right time and looking to come up with new solutions'

GAM2

GAM2 gave an actual example of this role in action:

'In the relationship, the truly global relationship that we have here, we suddenly questioned the way they were packing their product and this came about because for one or two reporting periods some of the boxes were getting wet in Asia. We asked why they used that packaging, and it eventually transpired that nobody had really looked at the packaging for probably ten years. So, I instigated a study and introduced the customer to a global packaging company. The first kick off meeting was very interesting because of the packaging examples sent. I said that I thought we could reduce the size of the packaging and the weight significantly which [the customer] liked. But then he turned round to me and said that you [CourierCo] are not going to like that very much are you, because you're going to get less money for each shipment. And my response was - we may get less money for each shipment but because of this project we're going to keep the customer competitive, therefore they should be able to take more market share, and we should get more shipments. Therefore, in the longer term we should be able to increase our business rather than lose market share with the current way they are delivered.'

GAM2

As with the NGAM interviews, the idea of the NGAM acting as a consultant to the customer was also mentioned by one of the internal respondents:

'The NGAM needs to act as a consultant and look at how the customer can do things better with, for example, their supply chain'. Int2.3

Another interesting aspect to emerge from the interview with GAM2 is that the consultancy can work both ways:

'We are selling [the customer's] electronic systems to other customers for their solutions. If they assist you in developing a new product they will get it a couple of years before you've launched it on the market and therefore they are ahead of the competition.'

GAM2

The GAM as visionary was described by one of the internal respondents and one of the customers:

'The NGAM needs to have a vision and ability to look at what the customer is currently doing and take a look from a subjective point of view and say - is that really the best way to do it, because maybe it's not.'

Int2.3

'I mean he, he has lets say, to also be a visionary person, seeing trends in the industry.So there's also a creative part to the role and what is important, furthermore, is that he has to have also the backup of his senior management to enforce the decisions.'

Cust1.1

The GAM as innovator also emerged from the organisation interview.

'Coming up with looking at new solutions, things that maybe have been coming on line and how they can use them, building on the [existing] advantage solutions. They need to be constantly innovatingit is about looking at immediate opportunities and then at longer term potential'

Org1

This wasn't just about developing and managing new ideas and opportunities but also about developing *common business opportunities*:

'We're looking into opportunities where we can create business or, let us say, where we see a chance that [the supplier] could do something. Or, where they suggest something - a new opportunity. So, between [GAM1] and I, we're looking for common business opportunities.'

Cust1.1

'He must also be making suggestions where we can create common business opportunities.'

Cust1.1

'We see him very much as a catalyst to move things forward for both organisations.'

Cust1.2

GAM2 also felt that he could not stand still, but had to be constantly moving forward and developing the ideas and solutions. He also felt this was a mutual role i.e it was about working *with* the customer and not about doing things *for* them.

'The one thing in managing this business, is that they don't want you sitting back and just saying, well, the revenues are coming in so I don't need to do anything.....the whole time it's about developing, developing, developing, moving forward, moving forward, moving forward, and working with them to understand where they are going and then to work with them for better solutions.'

GAM2

Focal Point of Contact

This construct was found in both the customer and internal interviews. The customers looked to the NGAM to provide a focal or single point of contact. Two key sub-themes underpin this construct. Being the *focal point of contact* entails:

- *Being in a key position to escalate*
- *Being in a key position to disseminate information*

Of the two comments below, one customer saw this as useful because the NGAM was in a position to then disseminate whatever needed to be communicated, and the other recognised that the NGAM was in a position to escalate things where necessary.

'It is good having the single point of contact. So, let's say he is the 'multiplier' in that respect. He gets the point of view and he then disseminates that and 'multiplies' it'. Cust1.1

'We expect him to be the focal point for escalation of issues, again proactively, you know? And when you are really dealing globally like we are dealingalmost every shipment is intercontinental and then on to the end customer in a country. That is a much bigger role than it sounds when you just say escalation of issues and co-ordination'. Cust2.1

Nearly all the internal team members saw the NGAMs as being the focal point or single contact point for the customer at the strategic level:

'I think obviously that he will remain as the focal point in terms of one simple contact for the customer, regardless of the geographic location, the issues, or the business, so he can always represent the company globally.' Int 1.4

'I think the NGAM adds value to the customer through being a single point of contact worldwide and having knowledge of our operations in 200 countries'. Int2.3

'They should be the key person that the customer talks to, to exchange information on where the business is going and what they're trying to do'. Int2.4

Facilitating the Contract

This was seen by the customers and the NGAMs as important, because without them bringing the *contract to life*, the global agreement would fail as

local and regional managers in both organisations would continue to do their own thing:

'The thing is that we are very decentralised and he's also, lets say, the contact point that goes out into the countries and what is very crucial is that he gets the message across, not only to his people, but also to our people. So, he visited more or less let's say every country within the last year where [we] and [CourierCo] have a common relationship. ... You can make a contractbut you have to roll it out and bring this contract into life and he has to communicate it'

Cust1.1

'Just having a global agreement or contract does not mean that everyone in both organisations is signed up to it. At local level you know, they could say, screw them, I'm going to do it my way and to hell with them. The contract needs to be pushed internally in both organisations if it is going to work. The global account manager is key in getting buy-in to the contract'

Cust2.2

'There is a big task to be done in persuading the people at country level in the customer that there is a contract that they should be working to. I cannot do this alone. I have to rely on getting the RGAMs and KAMs to work at all levels of the customer on this issue'

GAM1

Managing the Exchange of Best Practice

The NGAMs and the customers articulated that part of their role was to facilitate the exchange of information and best practice, both within the customer base and within their own organisation.

'We have quite a cross-fertilisation of ideas between the organisations.'

GAM

'You can learn from the regional people where the good ideas are - what has worked well. It can then be adapted to other regions. Sometimes you can also bring back ideas from the customer - it can be a lot of education to do this.'

GAM2

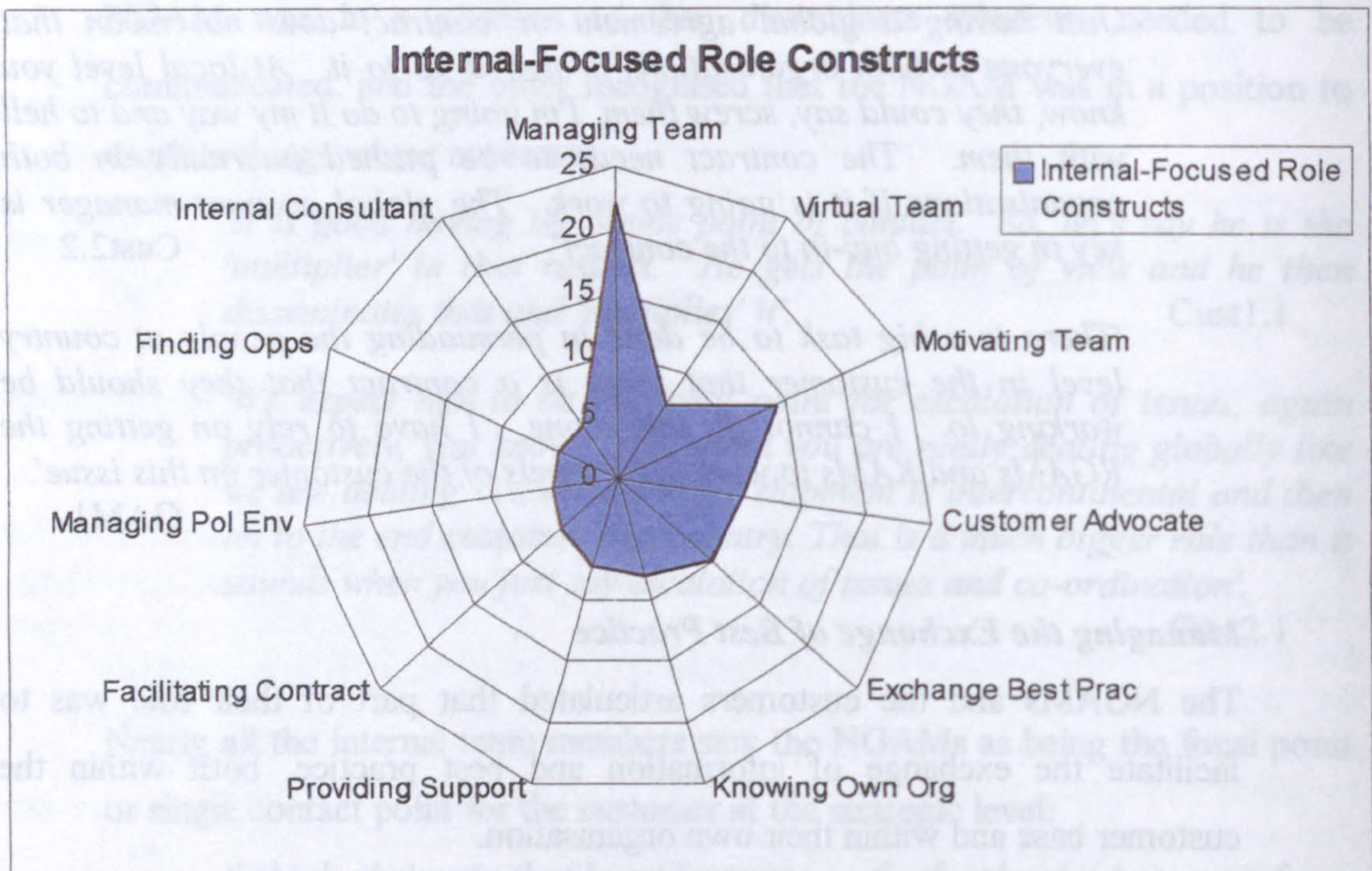
'I would look to the NGAM to seek out new opportunities in direction. For example, he might come back and say, look you know we have started to provide this kind of capability for [another customer] or, maybe they wouldn't even tell us who their other customer was. But, they would come back and strategically layer their new capabilities on ours, and offer those to us and talk about what they could do in addition to what they've previously done for us'

Cust2.1

5.4.3 Internal-Focused Roles

Having discussed the customer-focused role constructs that came from the analysis of the CourierCo interviews, the internal-focused role constructs are now explored. Figure 5.6 represents the text count by the internal-focused constructs.

Figure 5.6 Internal-Focused Constructs by Text Unit



Managing the Internal Team

This construct has the highest text count of any of the constructs from the CourierCo data. The researcher first started coding the construct merely as *managing the internal team*. However, as coding progressed, it became clear that there were two other strong sub-themes emerging from the data in this case study; *Motivating the Team* and *Managing the Virtual Team*. While both NGAMs in this case did not have directly reporting teams and therefore, every team they led could arguably be said, to be virtual from that perspective, the researcher only coded to the virtual team node if the respondent actually used the term. This is because the term *virtual* can have a number of meanings in the global environment as discussed in Chapter 9 in the cross-case analysis.

As already described, there are many people involved in managing each customer relationship from local level to strategic level. A major part of the NGAM's role is to manage the internal network to ensure delivery for the customer is consistent across the globe. None of these people report directly to the NGAM, so one of their roles is to act as the team leader of, using their words, a *virtual team*.

'That's critical to this, in fact I mean its difficult as well because it's a virtual team and it's getting people to work as a team where possibly, well in most cases they're not reporting into that person. So leadership skills are key and team building, team working is key'. Org1

'The NGAM needs to build the virtual team. It's all about that otherwise you don't get anything done. ...They need to be able to motivate people'. Int2.4

This was seen as a critical aspect of the role as only the NGAM had the *big picture* about the customer, yet they needed to be able to motivate and stimulate the whole team around the globe.

The role of *managing* or *leading* and of *motivating* the team was seen by both NGAMs as a major part of their job. It was also seen as one of the biggest challenges for both NGAMs when asked that question.

SH: *'So in terms of managing the internal focus what sort of key activities or roles do you have in terms of that?'*

GAM1: *'Communication and implementation of the strategy, that takes I would say, 60-70% of the time. You constantly have to be in contact with the key account managers because I know that [the customer] is just one of many accounts for them. The more highly active I am the more active they will be. The more easily they can do their job to grow their revenue, the more they will focus on [my customer]. So, it's very simple but very, its also very time consuming for me but that's what I love. This is probably the best thing, if you have a good team working with you, this is really a pleasure'*

SH: *'So team management is an important part of your role?'*

GAM1: *'Yes and like we said before they are not reporting to me. I cannot tell them what to do, I can only ask them what to do. If they don't do it of course, then I can go to management and so on, but then you have broken off the ties for the future. Then they will only do what you've asked them to do. They will not think or do anything on their own, so it's a very crucial, sort of balancing of the rope here on how you*

approach the team members. So again, my history was to play in a team, an ice hockey team. Everybody had got to be together and it's definitely the same thing here okay? One has to, at least on the paper, be the leader. But, in the end, the key account manager, they get paid for what they bring in so if you can put the carrot there and make sure that its on the silver plate. They will run for it and then they will appreciate the work that you do, and they will do even boring things like following up on service issues or whatever. But this is really - I think to be able to manage a global account you need to be the best here. I compare a lot of my colleagues and there is a lot of different styles but I think that the successful ones, they manage to juggle this - to get people to support their accounts by putting a lot of opportunities their way.

SH: *'So you've got to know those people very well?'*

GAM1: *'Yes and care about them and things like that, definitely.'*

SH: *'So I guess what you're doing is, is sort of motivating and enthusing those people?'*

GAM1: *'Yes, and again listening, being a psychologist and everything in the meantime as well. And just take the time to do it and it pays off - it really pays off.'*

.....

'The personal relationships are very important. Being able to work very, very hard, come up with the solutions but also the ability to say, right, we've finished a day's work, lets go and have a beer'. GAM2

'Part of the role lies in celebrating successes, building relationships, looking to do some team building activities with the customer's team and your team so that they really do feel part of the operations'. GAM2

Customers saw that managing and *motivating* the internal team was a role the NGAM needed to do well, if their organisation was going to deliver for the customer.

'The NGAM needs to build a team internally that can respond to our needs quickly and flexibly. I want to know that wherever I am in the world that the people at local level know and understand our requirements'. Cust1.2

'He's got to motivate the people inside [CourierCo] to want to cope with us and we're not an easy customer to cope with'. Cust2.2

Being a team leader was an obvious expectation of the respondents, given that they had been identified as team members. As well as needing a team to make the global structure work, one respondent also mentioned that having a strong team was something the customer valued.

'Well of course they have to be very, very open and lets say, very good in team leadership.[the customer] values the strong team we have

globally and they value my knowledge and [GAM1's] knowledge about what is going on in other countries. They really understand and value this team that we have'. Int1.3

... ..

Int1.4: 'I think what's really important to be a successful NGAM is that you need the team. You cannot work on your own, you need the team to support you globally, it's a very big territory, 100 something countries.'

SH: That's very interesting because I think it looks like GAM1 has managed to get a team spirit going even though you don't meet him very often.

Int1.4: Yes.'

Not only was team management seen as a key role, but also the ongoing development of the team, particularly in terms of giving support, identifying opportunities for the team, but also in terms of facilitating and encouraging the team members to take responsibility for the customer and use their own creativity and ideas. In this role the NGAM could be said to be adopting a *coaching* role.

'There needs to be somebody there to direct given strategy...but then you've got to have the key account managers and the RGAMs taking the lead themselves otherwise you cannot grow faster. If you have a lot more people working in the same direction its much, much better for the account. So you just give direction but then you just make sure that they're running in the right direction. You don't get into stopping opportunities or getting too much into the nitty gritty because then you stop them from being creative.' GAM1

'I think the main role is to really, as each region wants to go off and do its own thing, is you have to pull them all together. You have to understand the requirements that are different within that region and therefore be flexible and develop with them solutions that can be adapted to each region.' GAM2

Customer Advocate

The customers identified a role for the NGAM which they described as their *representative* back in their own organisation. This role went beyond that of merely communicating the customer's requirements to actually representing them in discussions with senior management. The researcher has used the word *advocate* to describe this construct as it has a wider meaning than ambassador and represents the part of the role that requires the NGAM to act and also mediate on behalf of the customer:

'In this role the NGAM is really the key communicator for us. We expect him to go back to [CourierCo] and act, if you like, as our ambassador.....our advocate'. Cust1.1

'We looked to [GAM2] to act as our representative inside [CourierCo]. You know, we expected him to do that, and I think that's not easy for anybody because he's obviously being paid by [CourierCo]. I mean we didn't expect him to give us financial benefits but we expected him to represent to [CourierCo's] management our issues, our points of view etc, etc '. Cust2.1

'We wanted somebody in front of us that we could talk to and discuss issues with, and that person would have enough understanding to grasp the problem even if he couldn't, solve the problem for us at that moment. But, that he would understand the problem enough to be able to take that back and talk through his management chain to get something fixed for us'. Cust2.2

'He has to go back and communicate within his own organisation that if somebody calls from [our organisation] the people know that it is an important customer and will give good service and to sort out problems and try to resolve things. This is something [GAM1] has done very well'. Cust1.1

I think if I come back in a loop to some comments I made earlier which says that if there is conflict there in terms of which way [CourierCo] is going, and which way we are going or if there's something missing in [CourierCo's] strategy that we would need, then we would hope that our account manager would have sufficient leverage to be able to represent us in [CourierCo] management type meetings'. Cust2.1

Managing the Exchange of Best Practice

In support of this construct team members described a role for the global account manager that was very much about being in a position to pick up on good ideas and pass them on to other parts of the organisation.

'I think typically a customer like [this customer], even though they will have regional management working on regional projects, they work very closely on the global basis as well. [GAM1] just happens to know everybody, even where they are. He's a great man - he just captures every single contact he needs to know and by doing that that will reinforce whatever we are trying to do in Asia because the global endorsement is very strong within [the customer] and particularly the major business group that we have been working with. [GAM1] always tries to share the Business Development Plans and business case studies so that they can be reciprocated in another region and a classic example of what actually happened in Singapore recently is going to be replicated now in Germany or even Sweden '. Int1.4

... ..

SH: *'Right, so you look to him to disseminate, communicate what you're actually doing to everyone else within the organisation outside of North America.'*

Int2.3: *'Exactly.'*

SH: *'Right, and to act as an exchanger of best practice?'*

Int2.3: *'Exactly. So when I give people a high level overview of what our organisation looks like - this may not be the right analogy for the UK but it comes from our US football. The NGAM I call the quarterback - he calls play, he does what he needs to make a successful game and he kind of pulls everything together.'*

... ..

'They should be able to pass the knowledge down, but not just down, but also exchange it around the world with their counterparts. That information could then be used by the operations teams who are, for example, on a certain level so that we can try and interface with all the other people who are trying to achieve what we are trying to achieve.'

Int2.4

GAM1 felt it was his role to facilitate learning and knowledge in order to make the organisational focus on the customer stronger:

'I think a big job for me is to make sure that we document the business that we get, so we can copy it into other sites because the KAM, they don't have just one customer, they might have up to 100. So, the more you can give them in terms of sales tools or knowledge base, the stronger they get, the more they focus on [the customer] because they then have everything on a silver plate.'

GAM1

Knowing Own Organisation

As well as understanding the customer's organisation which was a key construct in the customer-focused roles, it was an extremely important part of the NGAM role to know and understand their own organisation and where to go and who to see to make things happen for the customer.

'One that also knows the ways to get around our organisation.' Org1

'These people have to make a lot of things happen and there's ways that you need to learn how to do that. I don't know the word for it.'

Org1

One of the customers when speaking of all the knowledge and understanding that the NGAM needed about the customer's organisation, also added:

'He has to know all this, of, course about his own company, definitely, in order to manage his network and to enforce decisions.' Cust1.2

Cust2.1 also commented on two key areas that the NGAM needed to have a grasp of internally:

'Specifically, you know, we would hope that our global account manager would understand their supply chain strategy.' Cust2.1

'We think it is important for our global account manager to understand [CourierCo's] strategic direction.' Cust2.1

Providing Support

In the same way that customers saw the NGAM as a customer advocate, the team members saw the NGAMs as being in a position to leverage management when help was needed with the customer at local and regional levels. The NGAMs were seen as being able to talk to senior management and make things happen:

'Sometimes it is difficult to find support nation-wide so I look to [GAMI] to provide strong support. So, if I need to have a key account person here or I need to focus on some logistics support, then if [GAMI] points out that issue to my managers then it is helpful and easier for me to fight these issues.' Int1.3

'Something that would be very typical is when we identify there are some issues somewhere. He [GAMI] will try to see how he can help and he will provide input as to how we may be able to resolve the issue, particularly with managers.' Int1.3

'In addition I think in his role his responsibility is that when I develop things locally, he'd make sure that those projects have visibility on a more senior level, so that the people at high levels are aware of what it is that we are doing.Because of their positions as NGAMs they tend to have a little more pull for us, you know, getting things accomplished, so he can get things done in a more effective way.' Int2.3

As well as a the aspect of the role described above, team members also wanted the NGAM to be there in support of what they were trying to achieve:

'He keeps providing us with a lot of good contacts that we were not aware of before in Asia. Well he can give us a lot of good sales information particularly about the senior level, high level contact. Also the other area of support I think that will be typical will be the pricing and negotiation for global contracts.' Int1.4

'What you want is that when you need something he will get back to you...you can always count on the NGAM if he's a good one that whenever you need help he will always be the one to come and help you.' Int1.4

Facilitating the Contract Internally

This construct as it applied externally in the customer's organisations was discussed above in the customer-focused roles. The customers, however, also saw this as one of the NGAMs' roles that they needed to carry out internally:

'Because of the nature of the centralised contract, he has to bring the contract to life in his own organisation and make it work, otherwise his people at country and local level may not use it.' Cust1.2

'We were a little bit worried that [CourierCo's] view of a global account manager was a little bit too marketing and sales oriented and not enough operationally oriented.What we were looking for was a global account manager that would help us progress in actually improving our global capability to deliver to customers on time consistently. So really we drove [GAM2] I think, into some areas where previously [CourierCo] global account managers had feared to tread, particularly in the operational side of life.' Cust2.1

'The big job that needs to be done by a network global account manager is to enforce the strategy- make sure we pushed it down to the business unit sites and that is done through the RGAMs and the KAMs.' GAM1

Managing the Political Environment

This construct is linked to the NGAMs understanding their own organisation and knowing where to go and who to know, but is more about how they managed the internal politics:

'I want to say that they need to know the political environment in their role.' Org1

GAM2 described the role as being very much like a *diplomat*.

'You've got to be a diplomat haven't you?' GAM2

'The internal politics are always there and you've got to influence and you've got to manage the situation. I find that if you treat each department within the organisation as though they were a customersuch as operations, product development, transportation, whoever it is. They all need to be managed the same way. You have to treat them so that they want to do business with you. They then enjoy dealing with you. You also need to keep some fun in the work so that it's not all work, work, work.' GAM2

Finding Opportunities

Linked to the exchange of best practice construct is what the team members referred to as finding or developing opportunities. They had an expectation that the NGAMs would see opportunities that might be of use to them in increasing their business at the local or regional level.

'Well I think his role is of course to try to like, dig deeper into the projects and possibilities, like the sort of opportunities that might be possible for the customer in Finland.' Int1.3

'Typically it is up to me to find opportunities to develop locally, but [GAM2] would be talking to one of my colleagues in another region that he recognises we may also have a possibility to develop that same solution in the US and he will bring it to me. [GAM2] can certainly foster opportunities through cross-regional selling - that's very helpful.' Int2.3

'Ultimately the [NGAM] is responsible for generating revenue for the company and making sure it is profitable business by interfacing with key people in the account and developing new business opportunities for the company.' Int2.4

Being an Internal Consultant

As well as the external consultant role discussed above in *the developing new ideas* construct, an internal consultancy type of role was articulated that is part of the NGAM's job.

GAM1: *'You have to - in our organisation anyway, spend a lot of time to make sure that the proper support is there for the business that we have and with [the customer] it's a lot of follow up on the business that we do to make sure that we are there for the new areas they want to go into like if they start up in a new country we have got to have a set up there. That takes quite a bit of time. Then we have some pockets of business which are crucial when it comes to service. So if it is a logistics service for spare parts then it is vital for business. The parts themselves might not be so expensive, but if a paper mill stops, it costs tens of thousands an hour or more. So, we need to have the proper routines to make sure we service them and that takes a lot of time to set up.'*

SH: *'How would you describe this part of your role?'*

GAM1: *'That's difficult. I guess you could look at it as sort of being or doing some kind of internal consultancy.'*

... ..

'A lot of the time I feel like I am a consultant to my own organisation when I should be concentrating on being a consultant to my customer.'

GAM2

5.4.4 Account Planning Roles

Having looked at the internal-focused constructs the account planning constructs are now explored.

Account Planning

Building customer-focused business plans and managing forecasts was seen as a fundamental part of the role of the NGAM.

'Yes they have the business plan and a forecast that they have to do. The mechanism they use to manage the business is reporting, so they all get the same reporting information that the business has generated across the world.' Org1

Building and generating account plans was very much part of the job. In the case of CourierCo, there had been a drive by the Global Director for all GAC account plans to be developed and agreed jointly with the GAC. These account plans were to be used both within the customer and within CourierCo as vehicles for communicating what the relationship was hoping to achieve. Internally, it was used as part of the mechanism for building the 'customer team' around the world:

GAM1:*'when the plan is approved by [the customer] then I send it out internally and there's no more discussion on that one. But then you have project plans and strategy plans with the individual business area and so on, and that is of course ongoing. So the business plan is done once a year during the summer and then if there are major changes it will be updated, otherwise these are the plans that would be agreed.[The customer] gets almost everything from there, the only thing that they don't get is profitability. Everything else they getso they don't have to come back for anything like who our contacts are or anything like that. They have it all.'*

SH *'Right, so basically in that respect, what I'm trying to get to ask is that it is virtually open, well it is a jointly agreed account plan?'*

GAM1:*'Yes, that was the intention with our business plan.'*

.....
'We had a three day meeting 2 week's ago in the States with the regional account managers from the various regions to go through the next three year plan and put together a structure around - what we want to do? - what do we want to achieve? - how do we want to position ourselves with the customer? - and how are we going to move this forward? It is going to be designed in such a way that the customer will be able to see an edited version of it - that they can sign up to.' GAM2

An internal team member also saw the account plan as a key vehicle for communicating what needed to be achieved by everyone on the customer team:

'They need to develop clear sound business plans of where [the relationship] is going, what the timescales we're working to and communicate that clearly and effectively so that everybody again is working in the right direction to the right timescales.' Int2.4

Making Business Cases

As well as formulating and agreeing joint business plans with customers, there was also a requirement to make business cases for specific projects that were not part of the existing plans.

'Where we have some big projects I have to put up a requisition form, make sure that I have the resources because I don't have them myself.But, if I know I have a project which is really very, very crucial for revenue I will definitely put this forward but I have to put it forward to somebody else, I cannot just say okay, now stop that, do this.' GAM1

Being able to present and understand business scenarios was also an aspect of the job that GAM2 described:

'You have to be able to look at that kind of situation as a business director in terms of weighing up and seeing what you're doing now and being able to see the impact for the future - making some balance of judgement between maybe losing something now but actually gaining a lot more for the future. If I play my cards correctly tomorrow I may get 20% less initially of 30% less in terms of revenue, but if I do X plus Y, I will increase my profitability by 30%.' GAM2

'The way people have been taught to sell, which is sell as much as you can is wrong because at the end of the day you've got to have as much profitability as you can. You can go out and sell 200 tape recorders and make a dollar, but you're much better to go out and sell 150 and make a dollar fifty. You need a business mind, not a selling mind.' GAM2

'We are not account managers we are business managers.' GAM2

5.4.5 Spanning Role Constructs: Customer and Internal Focus

This fifth set of role constructs did not form part of the original coding structure. However, as the coding progressed it became clear that two key construct areas

applied equally for the NGAMs in the external customer environment and in the internal customer environment. These particular constructs were difficult to split out into the customer and internal codes as respondents often expressed them together but it also became evident (see cross-case analysis in Chapter 9) that these two constructs underpinned the other four construct groups in terms of being *spanning roles*. From many of the comments across all four cases, it was suggested that if these roles were not fulfilled then it was unlikely that a global account manager would be able to carry out their job in an effective way. They also have several sub-themes each. The two constructs and their sub-themes are shown in Figure 5.7:

Figure 5.7 Spanning Role Constructs and Sub-Themes

Spanning Role	Sub-Themes
Managing Communication	<ol style="list-style-type: none"> 1. Strategic Communication 2. Information Manager 3. Establishing Global Contacts 4. Keeping People Informed 5. Communication Media*
Managing Different Cultures	<ol style="list-style-type: none"> 1. Country Culture 2. Corporate Culture 3. Business Culture

* This has a number of further sub-themes in terms of type of media: *email; face to face; verbal; website; newsletter*

Managing communication

Like the internal team management construct this is a key construct in terms of the number of text units. This is a critical part of the role of the NGAM, especially in underpinning many of the role constructs already outlined above.

'Communication is fundamental. I'm working on building this reporting or information tool because these NGAMs need ways of keeping their counterparts informed and up to date on what's going on. It needs to be more than just sending emails and these sorts of things. We can be more sophisticated than that and more proactive, so I'm working with them to develop a system to help them better manage the whole virtual team and their customer'. Org1

Being able to *manage strategic communication* at a global level i.e. across countries and locations was something that customers felt the NGAMS needed to do. This necessitated building up a network of *global contacts*. Also, the exchange of information and communication between the two organisations was important as well, so the NGAM took on the role of *information manager*:

'You have to be a very good communicator and have to win people and convince people. This means the NGAM has to build a very good network that will allow him to have influence and know who to go to.'

Cust1.2

'Lets say the biggest benefit is the job he has of establishing contacts in all parts of the world so that he can act on behalf of [our organisation]. It is really the cross country work that he can do that adds value.'

Cust1.1

'What I expected from either the [Global Account Director] or [GAM2] or both was to be kept informed of major changes in CourierCo's] strategy. Obviously you know you can't expect even your partners to tell you top secret information but you want to know as soon as it was reasonable for me to know. If [CourierCo] was going to change something dramatic in the way that the company was structured or way that they did business then, you know I think it was fair for us to expect to be informed of those things. And I would feedback the same information the other way. You know, if we were going to close a factory, or do something drastic, or go into some different products or things like that, I would do it. So it is a two way street in terms of the strategy of the two companies.'

Cust2.1

Strategic communication was also a major part of the role described by both NGAMs. This was partly to do with communicating with the customer at all levels on a regular basis and particularly with key contacts on the day to day service but also to communicate ideas and new agreements between CourierCo and the customer within the customer base. Both saw themselves as the focal point for customer communication and for leading discussions between their senior team and the customer's senior team:

'We have global meetings where we get together, sort of top management on both sides and review the progress, discuss where the business is going, where the customer's business is going over the next twelve months and generally trying to itemise what the key changes and improvements are.'

GAM2

It was also important for the NGAM to be the main conduit for the communication between both organisations in order to keep control over the contacts.

'Communication...at all levels is going on and it is very important that we have teams at the local level talking to each other... ... but you always have to be careful. It's very good for everybody to be talking together but you have to keep control over it and make sure that they don't change things without you knowing'. GAM2

However, this did not mean that everything needed to be channelled through the NGAM. Part of the role was to facilitate direct communication where this was more appropriate:

'So they might initially need to go through the RGAM and me but then we get the communication going between the countries. This I think is very important as well because otherwise you're suddenly in the middle of a lot of emails where you've got no value to add. So we try to enforce direct communication, where appropriate. That's really important as well for your work otherwise you get bogged down with a lot of issues.' GAM1

The internal team members expressed a view that from their perspective one of the roles that the global account manager needed to do was to be an *information manager* and a channel for communication. In particular, communicating what is happening with the customer that might affect them at country and regional level and what is happening in other countries and regions. They wanted to be *kept informed*:

'I see them [the global account manager] as the information channel. They are very vital in providing me the information about what's going on in other companies and what kind of big picture [the customer] is thinking about'. Int1.3

'When he's communicating with [the customer] at high, high levels he might hear something that affects my country, my customer here and he can provide me with the information.' Int1.3

'I see the NGAM as providing the information about what is going on in the account and the network so I know what's going on. I should know what's going on and I should really see how profitable certain areas are.The NGAM is in a position to really extract information and to pass that information down so that we understand what it is we're trying to do when we take on new business or new flows of material. If we understand the customer's needs and desires then it can only help us deliver that further across the board'. Int2.4

The internal respondents also covered a range of issues for the global account manager, from simply sending out clear and specific communications to the requirement to know who they need to communicate with.

'He has to send out very clear and specific communication to avoid confusion and misunderstanding' Int1.4

'He really has to know who is dealing with whom in the major countries at least, so that they can help forge the link or strengthen the link we have in the country or at the regional level' Int1.4

'I think communication skills both written and verbal are important as in the NGAM position you have to have interaction with a much higher level of people than you would as an RGAM.' Int2.3

'The need to demonstrate and communicate what it is they're trying to do and really get down to a level...so that we're all playing the same game' Int2.4

In order to manage the customer and the internal teams effectively it was necessary for the NGAMs to manage much of the external and internal communications in respect of their particular GAC. The global nature of the job meant that it was impossible for them to use face-to-face meetings as a main means of communication. *'In my time with the account I cannot get around to all the countries...I can maybe make it to 30 countries in a year but we need to attack all countries (GAM1)'*. However, face-to-face team meetings were held jointly with the key customer and key internal team members at least once a year, facilitated by the NGAM.

Apart from day-to-day communications using telephone and email, a key form of communication was via the intranet website that was set up for each GAC. The website contained all major communications about the customer, customer presentations, contacts and networks, the business plan, the business plan presentation, the customer's rates for business and how the account was doing. Everyone in the world who was dealing with the customer could get up to date information.

The NGAMs also produced newsletters about the relationship on a regular basis that were circulated at all levels within the customer and within CourierCo. The customers also had an extranet that allowed them access directly to much of the information they needed about the relationship with CourierCo and their day to day management information about transactions etc.

Managing Different Cultures

One of the roles that differentiates KAM from GAM is that global account managers have to manage different cultures both within their own organisation and within the customer's organisation. Although three sub-themes were illustrated in Figure 5.7, only two of them emerged from the data in this case study, managing different country cultures and managing different business cultures:

'Cultural awarenessI mean that's quite important when you work on the global level.NGAMs have to be able to operate across a number of different cultures. the empathy that they have for the different parts of the world and different types of way the business is done in different parts of the world. That's why it's such an interesting job.'

Org1

As emerged from the organisation interview, managing different cultures is a feature of the role. Again, this was an aspect that concerned both the relationship with the customer and the management of the internal virtual team.

'For me it's also very, very important for the NGAM to understand the different cultures I think it's also crucial for success to have somebody who can adapt when they go into the different cultures.'

GAM1

'Managing cultural issues is important.When in this global business you've got to understand the different cultures and different parts of the world - that is key.You've got to have somebody who's comfortable in all cultural environments and all levels of management...aware of cultural differences and a good listener'

GAM2

The requirement of the NGAM to manage different cultures was also mentioned by one of the customers.

'He has to be a multi-cultural person with an understanding of

different cultures, and the ability to manage them, as he is dealing with many different cultures within [our organisation] and within [his organisation]'. Cust1.2

This was also an area which the NGAMs thought could be given more focus in the organisation in terms of training and development:

'Working in a cross-cultural environment is probably something that we should look at as a global company in a different way as well - maybe we need to have some more training and development on what this is all about.' GAM1

'This is certainly one of the challenges of my job. And I have worked all over the world and had customers all over the world'. GAM2

5.5 FURTHER ANALYSIS AND DISCUSSION OF CASE STUDY 1

The role constructs for CourierCo have now been presented and discussed. The data was analysed using a coding framework which started with the four key constructs from the literature review and conceptual framework as discussed in Chapter 4. From the coding of the data, a fifth top level construct (or tree node on NVivo) emerged, *spanning roles*. As this study is using literal replication the other case studies follow the same coding format as this case study. They also follow the same report format. As is consistent with reporting a literal replication multiple case study project (Yin 1994; Carson et al. 2001), the within-case studies will not be fully compared and contrasted until the cross-case analysis in Chapter 9.

Throughout the reporting of the within-case analysis a number of observations were made about the data. For example, sub-themes for a number of constructs were elicited and presented, some by the means of data displays and models. These data displays and models are a key feature of reporting qualitative data (Miles and Huberman 1994). Building models to explain the data is also consistent with the Realist research paradigm. It is not the intention to repeat these data displays here. However, in concluding this within-case study of CourierCo, some further observations on the data are now made.

5.5.1 An Analysis of The Role Constructs by Respondent Group

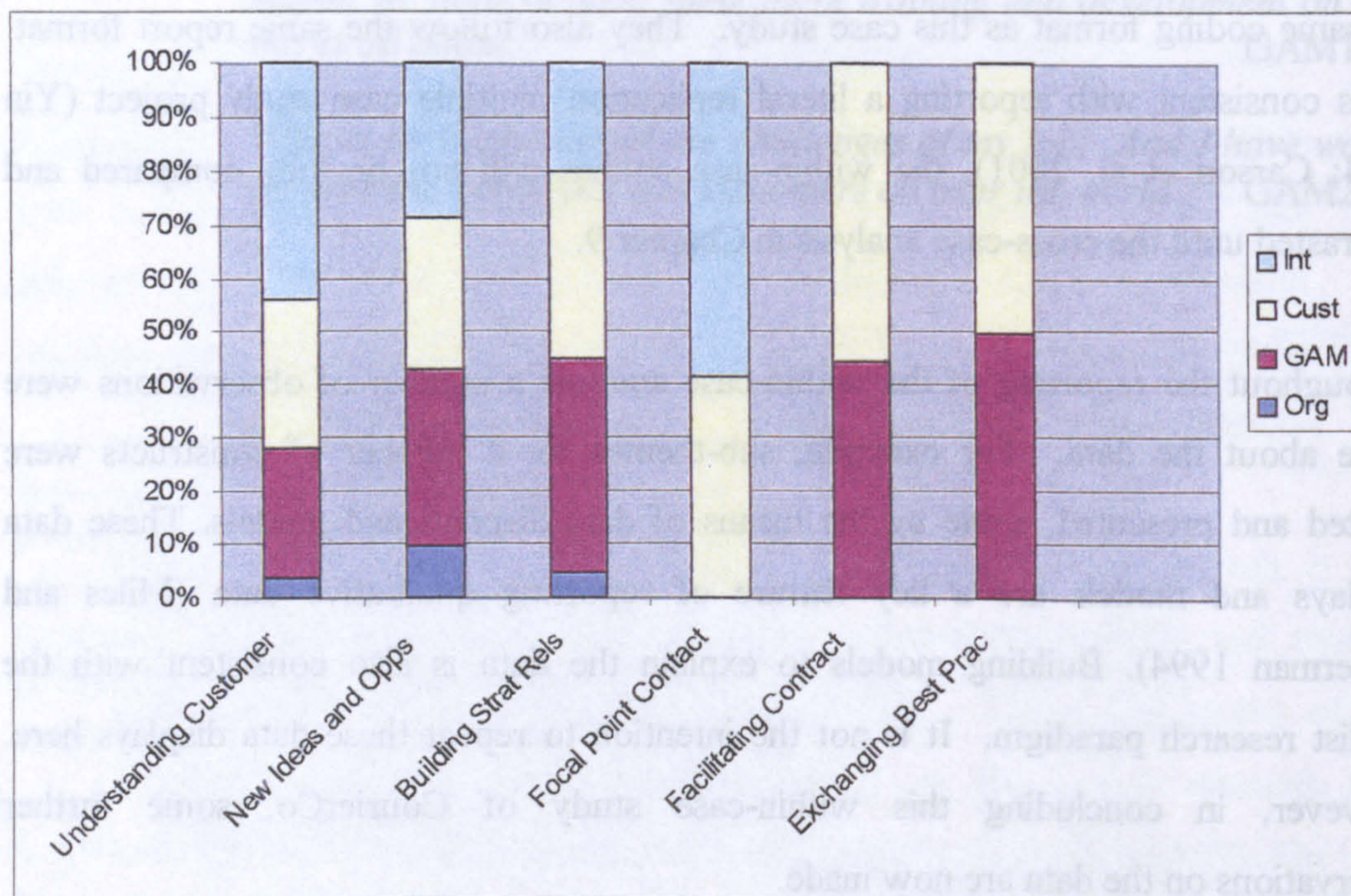
It is possible from the NVivo data to also analyse each construct by respondent group and text unit count. The results of this for the customer-focused, internal-focused and spanning constructs are at Figures 5.8 and 5.9 and 5.10. The numbers for the goal-focused and account planning-focused roles are too small to represent meaningfully.

Commentary on Customer-Focused Role Constructs

From a study of Table 5.1 and Figure 5.8, it is clear that there is a congruence of views from all four respondent groups on the most mentioned customer-focused role constructs; *understanding the customer*, *building strategic relationships* and *developing new ideas and opportunities*. There is then a drop in the number of text

unit counts for the other three constructs that emerged; *focal point of contact*, *facilitating the contract* and *exchanging best practice*. There was also less convergence from the respondent groups with only two out of four groups having commented on these constructs. Arguably, the top three constructs are more strategic than the bottom three constructs.

Figure 5.8 Customer-Focused Role Constructs by Respondent Group



The researcher would argue that one explanation for this is that the two relationships studied here are mature relationships and, therefore, all the respondents are concentrating on the more strategic aspects of the relationship. However, both the GAM respondents and the customer respondents are consistent in also commenting on the bottom two constructs. An explanation for this is that these two constructs are very much concerned with what happens in the customer's organisation and, therefore, may not be activities that suggest themselves to the supplier's more internally - focused respondents, the organisation and internal team respondents.

One interesting point to emerge is that the organisation and GAM respondents did not mention the *focal point of contact* construct while both the customers and the internal team members felt this was an important part of the GAM role as evidenced by their

comments. There are two possible explanations at this stage from the CourierCo within-case analysis. One is that the organisation and GAM respondents see this as an implicit feature of the GAM role and therefore did not specifically mention it or secondly, that they don't necessarily see the GAM as the focal point in the same way as the customers or internal team members. For example, the internal team members do have an expressed need for the GAM to be a focal point for the customer at the global level since they are not in a position to fulfil this themselves as they are generally operating at local and country level and do not have, in their words, the *big picture* of the customer. Customers clearly defined their need for a focal point of contact, but emphasised that this should be more in terms of escalation and dissemination than that the GAM should be the one through whom every single aspect of the activities should be channelled. This suggests a recognition from both the supplier and the customer that the account teams on both sides at different levels in the organisations are also responsible for acting as local and regional points of contact with the GAM acting as the *global focal point of contact*.

Commentary on Internal-Focused Role Constructs

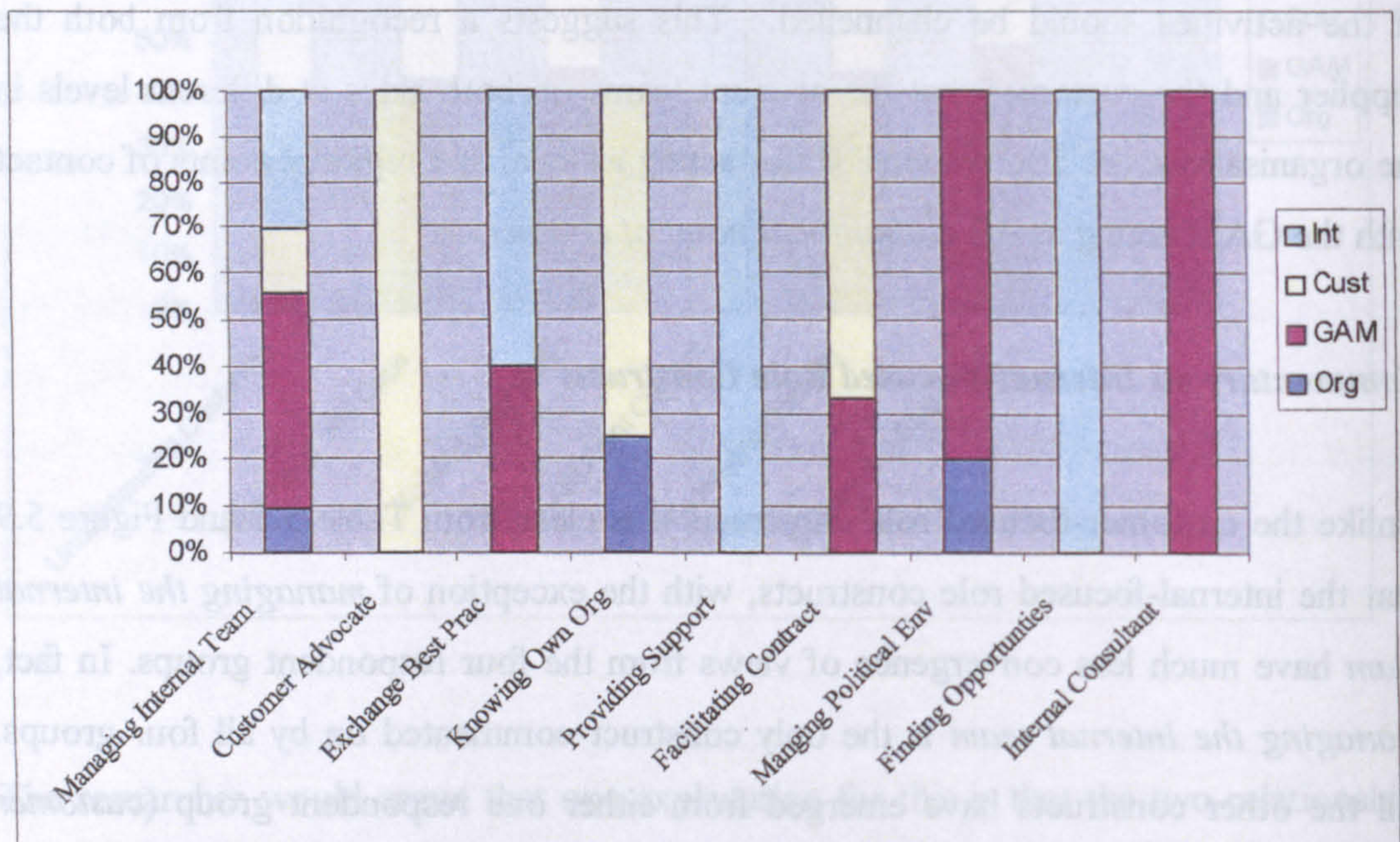
Unlike the customer-focused role constructs it is clear from Table 5.1 and Figure 5.9 that the internal-focused role constructs, with the exception of *managing the internal team* have much less convergence of views from the four respondent groups. In fact, *managing the internal team* is the only construct commented on by all four groups. All the other constructs have emerged from either one respondent group (*customer advocate, providing support, finding opportunities* and *internal consultant*) or across two respondent groups (*exchange of best practice, knowing own organisation, facilitating the contract*, and *managing the political environment*).

It is difficult from this one within-case analysis to offer any well-founded reasons for this. However, there may be several explanations which the researcher feels are worth mentioning. One explanation might be that as global account management is about managing global account relationships, that people in the relationship generally have a clearer view of what that means in relationship to the customer than to themselves. Customers generally, and in this case do, have a good idea of what they want from a supplier and can articulate that. The other respondents may have not

been as focused on the internal roles, because the first time they have really looked and thought about them may have been at the time of the interview.

Further explanations might come from looking at what each respondent group focused on. For example, the customers focused on those aspects that would enhance the relationship with them and where they could possibly see the role would bring advantages for them in what they wanted to achieve, such as the GAM really knowing their own organisation well and facilitating the contract.

Figure 5.9 Internal-Focused Role Constructs by Respondent Group



A key observation here is that the customers were the only respondents to mention the *customer advocate role*. Again, at this within-case stage of data analysis there is no clear explanation for this. One possibility is that this aspect of the customer's expectation of what the role should do is not recognised at all or is not seen as being a key part of the role by the supplier. Another explanation is that as with the *focal point of contact* construct the GAMs implicitly see themselves as doing this but do not articulate it in the same terms as the customers.

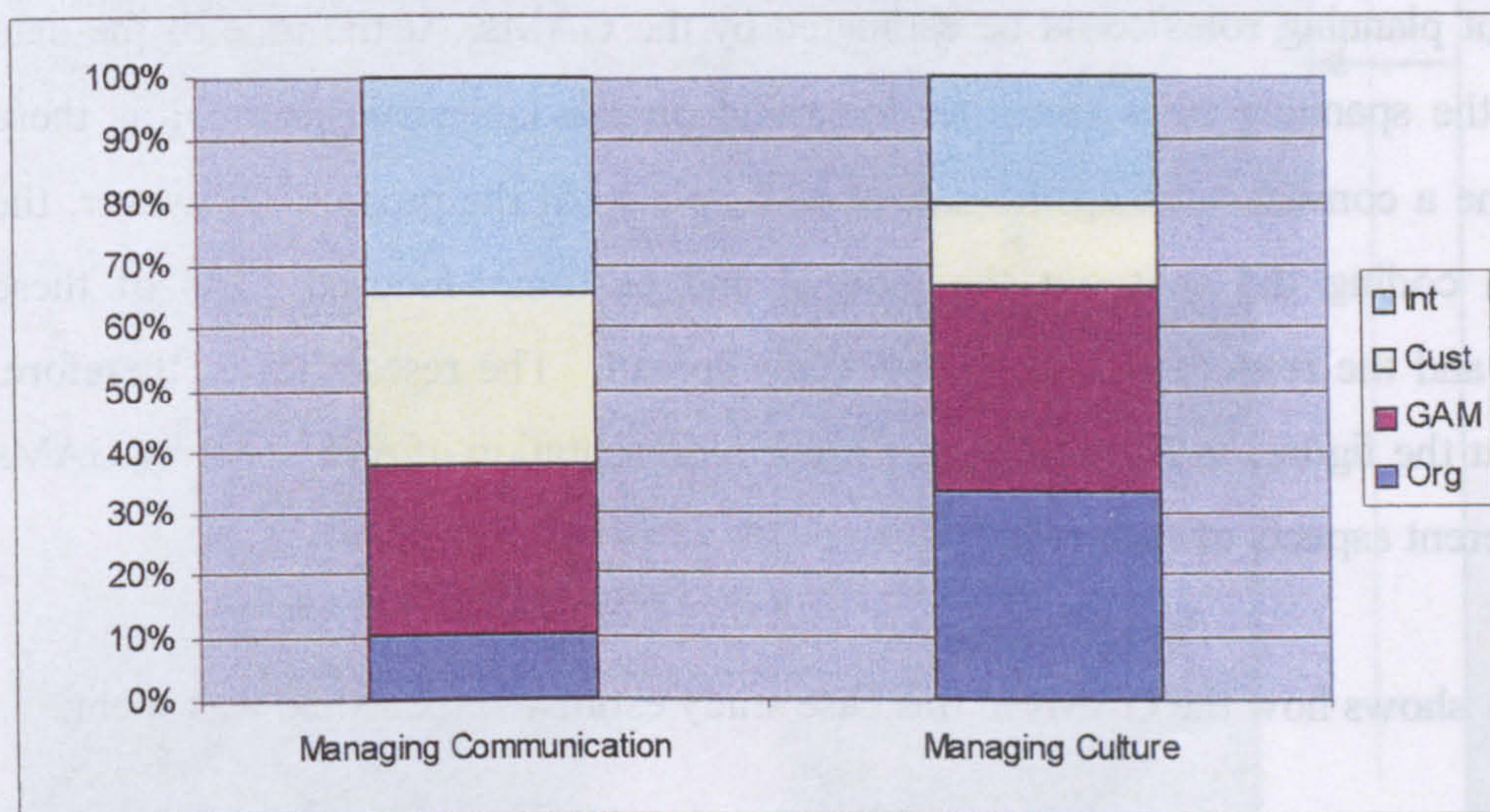
The internal team respondents had two constructs which only they talked about,

providing support and finding opportunities. These two constructs were about what they expected of the GAM in relation to their own positions and their effectiveness. They also thought the GAMs should facilitate *the exchange of best practice* internally as this would again enhance what they were trying to achieve for the customer at their local or regional level.

The GAMs were the only respondent group to focus on the *internal consultant* construct. Like the internal and customer respondents above, this is a role they can articulate that is directly related to what they feel they need to do. So, on the internally-focused roles, another explanation for the divergence is that the respondents find it easier and more comfortable to articulate these in relation to their own position than from the broader perspective they took with the customer-focused roles.

Commentary on Spanning-Focused Role Constructs

Figure 5.10 Spanning-Focused Constructs by Respondent Group



An explanation and discussion of the origins of the fifth set of spanning-focused constructs shown in Figure 5.10 can be found in paragraph 5.4.5. These two constructs of *managing communication* and *managing culture* and their sub-themes were talked about by all four respondent groups. The main observation here is that these two roles apply in both the customer and internal environments and it is possible that they underpin all the other constructs in that they are important for the other role constructs to be achieved and carried out at the global account management level.

5.5.2 Proportion Of Time Spent Externally And Internally

Finally, the proportion of time spent on customer-focused roles and the internally-focused roles emerged as a factor from the interviews with the GAMs. As part of the interview protocol, they were asked to estimate the proportion of time spent on the customer-focused roles and the proportion of time spent on the internal, and account planning roles.

It became clear that the time spent on customer-focused roles, internal-focused roles and account planning roles could be estimated by the GAMs. At the time of the data collection the spanning roles were not identified on the interview protocol as these only became a construct during the data analysis phase of the project. However, the first rough coding did split out the internal and customer-focused parts of these constructs and the responses were fairly evenly spread. The researcher is, therefore, content that the figures in Figure 5.11 are a fair representation of time spent by GAMs on the different aspects of their role.

Figure 5.11 shows how the GAMs in this case study estimated their time was spent.

Figure 5.11: Estimated Time Spent By GAMs on Different Aspects of their Role

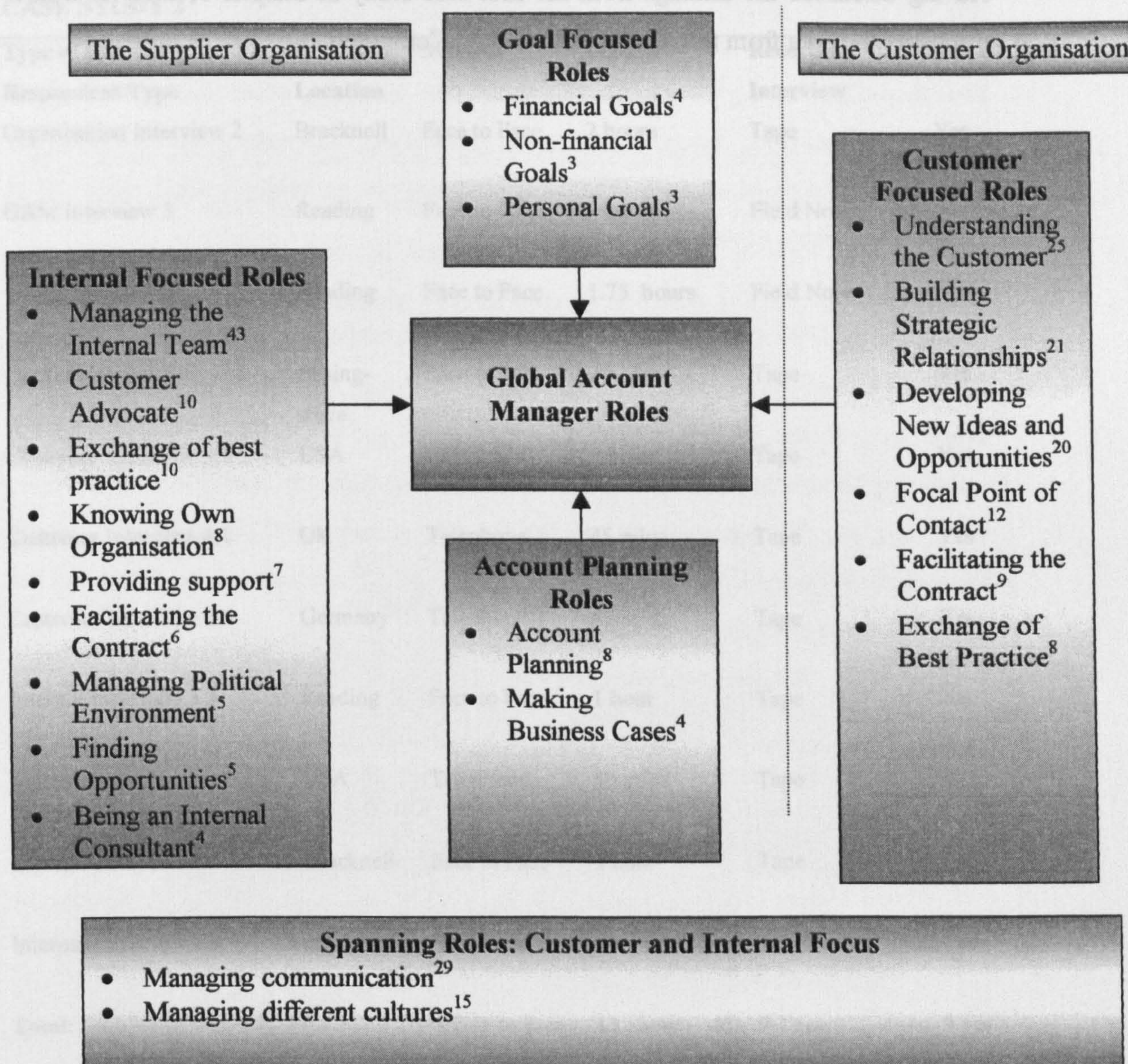
	Customer-Focused Roles	Internal Roles	Focused Account Roles	Planning
GAM 1	30	65	5	
GAM2	25	70	5	

This point is explored further in Chapter 9 in the cross case analysis and discussion.

5.5.3 Summary Of Role Constructs Identified In Case Study 1

Finally for case study 1 a summary of the roles is presented in Figure 5.12.

Figure 5.12: Summary of Role Constructs Identified in Case Study 1.



This shows the full range of role constructs identified by all the respondents in this case study. They are presented in text unit count order with those carrying the most text units at the top of each role category.

For the purposes of displaying the data from the within-case analysis, the role constructs are displayed against the original conceptual framework, as is consistent with qualitative research (Miles and Huberman 1994). The respective text unit counts have been included.

Having discussed the findings from the first case study in Chapter 5, Chapter 6 now discusses the data from the second Case Study, ComputerCo.

CHAPTER 6: CASE STUDY 2: COMPUTERCO

6.1 CASE STUDY 2: RESPONDENT INTERVIEWS

This chapter contains the within-case analysis of the data from the second case study; ComputerCo. The respondents in this case are shown again in Figure 6.1

Figure 6.1: Case Study 2 Respondent: Type of Interview

CASE STUDY 2						
Type of Interview	Interview Location	Medium	Length	Recording of Interview	Transcribed	
Organisation Interview 2	Bracknell	Face to Face	2 hours	Tape	Yes	
GAM Interview 3	Reading	Face to Face	2 hours	Field Notes	No	
GAM Interview 4	Reading	Face to Face	1.75 hours	Field Notes	No	
GAM Interview 5	Basing-stoke	Face to Face	2 hours	Tape	Yes	
Customer Interview 3.1	USA	Telephone	1 hour	Tape	Yes	
Customer Interview 4.1	UK	Telephone	45 mins	Tape	Yes	
Customer Interview 5.1	Germany	Telephone	40 mins	Tape	Yes	
Internal Interview 3.2	Reading	Face to Face	1 hour	Tape	Yes	
Internal Interview 3.3	USA	Telephone	50 mins	Tape	Yes	
Internal Interview 4.2	Bracknell	Face to Face	1 hour	Tape	Yes	
Internal Interview 5.2	UK	Telephone	45 mins	Tape	Yes	
Total: 11		6 face to face 5 telephone	13 hours 45 mins	9 Tape 2 Field Notes	9 yes 2 no	

6.2 CASE STUDY BACKGROUND

ComputerCo was the second of the case studies in the project. ComputerCo is a major global player in the computer solutions market. At the time of the interviews in 2001 the parent company [ComputerCo] was Japanese and there were three companies that were part of the overall business one of which had been a long-standing British computer and software solutions company.

This company had been running a Key Account Management programme for over 10 years and at the time of the interviews in 2001 there were some 45 Client Directors and Client Managers (CMs) operating out of a number of industry-based divisions. The industries were, for example, sectors like banking, other financial services, Central Government, Local Government, Education, Manufacturing, Airlines and Travel, Telecommunications. These client managers generally worked with either one or a maximum of two customers.

However, by 1997 a few accounts had also been identified as global accounts as they not only served global customers but also the services the customers required were drawn from across all three of the main businesses and not just one key business. It was recognised that all three core businesses had different strengths and different competencies. *'We increasingly saw the need for a meta-level co-ordination for our customers that were truly global Org2'*. So the global accounts were set up and run at the Japanese parent company level.

'We originally saw the need to create Global Account Managers who could span the businesses, provide a focal contact point, co-ordinate activity and do longer -term customer planning. We also recognised that rather than simply incentivising them on revenue that we needed to look at things like long-term revenue growth, customer profitability and customer satisfaction' Org2

'We wanted to move away from the 'I only play golf and do the dinners' type of strategic sales activity to something far more robust that could significantly contribute to the business'. Org2

'All three of the businesses have different strengths and core competencies. We felt that by co-ordinating the global customers at the meta-level this should lead to a greater potential in terms of expanding existing business as they would have access to the whole

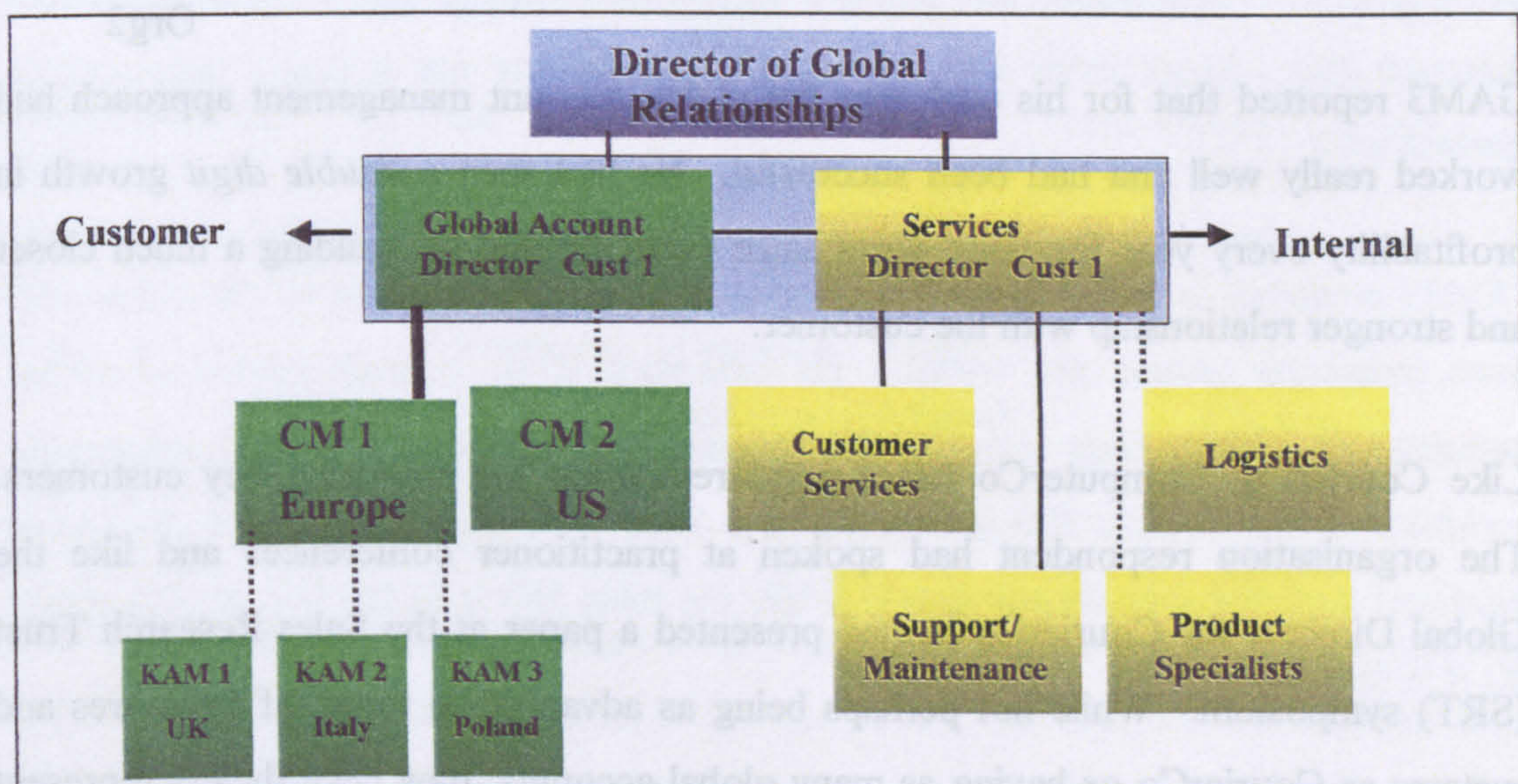
offering through a dedicated, co-ordinated and centralised position - the Global Account Director'. Org2

At the individual business level it is recognised that there are also some *international key accounts* which span either a region or a few key countries where the customer is operational. However, these are not part of the global account customer group.

At the time of the interviews four accounts had been designated global accounts and while it was intended to add to these, it was '*unlikely there would ever be more than 10 global accounts due to the amount of resources involved in managing accounts at this level (Org2)*'. The people in the global account manager positions had the title *Global Account Director (GAD)*.

The GADs reported into a the Director for [ComputerCo] Relationships. They did not report into any kind of sales structure. However, they did have an interesting structure for managing one of the customers at global account level. This organisation structure for managing a global account at ComputerCo is in Figure 6.2.

Figure 6.2: Organisation Structure for Managing a Global Account at ComputerCo



The above organisation structure shows that alongside the Global Account Director who was responsible for managing the global customer is a Services Director who was responsible for managing all the operations and services that related to that customer account. The Services Director did not report to GAD but worked in partnership with the GAD at the same level. Their objectives and targets were linked, and they were rewarded not only for what they achieved with their own job and teams, but also on how well they jointly achieved targets relating to the customer.

Two of the GADs had a support member of staff reporting directly to them. These were also people who could be seen as part of the succession plan. Because the GADs were undertaking a lot of travel in managing their accounts, these people were seen as:

'In the absence of the GAD these people provide a point of contact that is known to the customer. We also recognised that by working alongside the GAD we could develop them into the GAD role in the future. This we felt was important in providing continuity for the customer in the longer term.'

Org2

To date, the client management and global account management are working well and feedback from the key customers from various pieces of customer research carried out by the organisation was that:

'We feel that for big clients, the account managers really do add value'

Org2

GAM3 reported that for his customer the global account management approach had worked really well and had been successful. He had seen a *double digit* growth in profitability every year for three years since concentrating on building a much closer and stronger relationship with the customer.

Like CourierCo, ComputerCo has a good reputation for managing key customers. The organisation respondent had spoken at practitioner conferences and like the Global Director for CourierCo he had presented a paper at the Sales Research Trust (SRT) symposium. While not perhaps being as advanced in terms of structures and systems as CourierCo or having as many global accounts, they nevertheless represent a good example of global account management in practice. The global programme had been running for just four years at the time of the interviews.

The selection of which global accounts would take part in the study was dictated by the number of global accounts the company had. The top three out of the four global accounts were chosen by ComputerCo to take part in the research and all three GADs and their customer organisations remained with the project throughout.

6.3 CASE STUDY 2: RESPONDENT PROFILES

The attribute data recorded for the ComputerCo case study was identical to that described in paragraph 5.3 of Case Study 1. The attribute data profiles for the ComputerCo respondents is shown in Figure 6.3.

Organisation Respondent

This person was the Director for [ComputerCo] Development of Customer Relationships and operated at a senior level within the company. The GADs did not report to him, but he was very involved in formulating the policy for the global and individual company-level key clients. He held a senior position to the GADs.

He had moved from Finland to his current role in the UK two years prior to the interviews in order to broaden his experience of *'managing long-term profitable relationships.'* He had developed a number of what he termed *models* for account management for the company, including the account planning model used by the Client Managers and Directors and by the Global Account Directors.

Global Account Manager Respondents

All three GADs are based in the UK and are located near to their customer's HQ or European HQ. All of them had been a Client Director for a major customer at business level.

GAM3's customer is global software supplier and services supplier to the airline and travel industries around the world. He described it as *'a truly global company operating in nearly every country in the world. They have 10,000 employees worldwide of which only 300 are in Europe. They have been a customer for seven years and a global account for four.'* While the main HQ is in the US, the European HQ is in the UK.

GAM3 had joined the British based computer company in 1986, on their graduate programme. In his time with the company, he had worked in a number of different

areas of the organisation including customer support, customer service and delivery, as a technical consultant and more latterly in business development.

Figure 6.3: Case Study 2 Respondent Profiles: Attribute Data

CASE STUDY 2						
Respondent Type	Work Location	Nationality	Gender	Job Title	Time in Current Job	Age
Organisation Interview 2 <i>Org2</i>	UK	Finnish	Male	Dir Development Customer Rels	2 years	37
GAM Interview 3 <i>GAM3</i>	UK	British	Male	Global Account Director	4 years	39
GAM Interview 4 <i>GAM4</i>	UK	British	Male	Global Account Director	3 years	51
GAM Interview 5 <i>GAM5</i>	UK	British	Male	Global Account Director	2 years	45
Customer Interview 3.1 <i>Cust3.1</i>	USA	American	Female	VP Global Operations	4 years	X
Customer Interview 4.1 <i>Cust4.1</i>	UK	British	Male	IT Director	2 years	X
Customer Interview 5.1 <i>Cust5.1</i>	USA	British	Male	Chief Information Officer	1 year	X
Internal Interview 3.2 <i>Int3.2</i>	UK	French	Female	Client Manager	2 years	34
Internal Interview 3.3 <i>Int3.3</i>	USA	British	Male	Service Director	3 years	33
Internal Interview 4.2 <i>Int4.2</i>	UK	British	Female	Client Manager	2 years	35
Internal Interview 5.2 <i>Int5.2</i>	UK	Irish	Male	Client Manager	1 year	33
Total: 11	3 countries	5 national- ities	8 Male 3 Female			

GAM3 had some international experience prior to taking on the GAD role and had significantly increased it as a result of the global job. He had been a GAD for four years and was personally responsible for building the relationship with his current global account. Having proved to be successful in the global role, as reported by Org2, he was due to take on a new global account that was seen to be a major

challenge in terms of the type of customer, a large global consultancy. He was due to be replaced on his current account by the Client Manager who reported directly to him and who had been '*groomed by myself and the customer*' to take on the role. Two comments from GAM3 are included here as representative of the time factor involved in account management:

'Management backing is important - having a manager who understands that the return won't be immediate. It took nine months to get the first result.' GAM3

'It takes at least two years to build up the close relationship. You only get the trust and respect over time.' GAM3

GAM4's customer is a global airline. This was the first global account ComputerCo identified. It was driven partly by the customer, who '*wanted more synergy in their relationship with [us]*', and partly the GAD, who was then the Client Manager for the customer, who said '*we needed more coherence in our strategy with the customer*'. At the time of the interview the customer operated in over 90 countries worldwide. When asked what it was like to be the person at the leading edge of global account management in his organisation his response was '*it is great to be at the 'leading edge', but at times in this job it also about being at the 'bleeding edge''*.

GAM4 had joined ComputerCo to manage his current customer some six years previously. He was well known in the customer's industry and had held a number of senior general management positions as well as senior sales positions. At one point in his career he had worked for the customer for four years. He was, in terms of age (51), more mature than most of the global account managers who were interviewed for this project.

Internally people saw GAM4 as effective in his role:

'I think that it is his seniority and his gravitas that makes him successful with the customer. It shows the whole account team has depth. He is representing the whole group and our brand. He gives out a strong message of what our core capabilities are.' Int4.2

The customer of the GAM5 is a major global technology and telecommunications company, which interfaces with ComputerCo in a number of key business areas. The

customer has been a key client for many years and it has been treated as a global account for a year.

GAM5 had worked for the company for over 8 years and like GAM3 was a university graduate. Prior to joining the company he had worked in systems analysis, then moved into technical management and programme management in two blue chip companies and had then moved into technical sales management. On joining ComputerCo he had worked on business development and then became a Client Director for a major Defence establishment. GAM5, at age 45, was also at the mature end of the GAM age range.

All the GAMs said that they had very senior level contacts in their customer organisations, some at board level and sub-board level.

The Customer Respondents

For GAM3

Cust3.1 was a Vice President for Global Operations for a global software supplier to the airline and travel industry who at the time of the interview was based in the US. Prior to returning to the US she had worked in Europe with responsibilities for initiating an organisational structure and strategy for e-commerce initiatives and other commerce within Europe, the Middle East and Africa region. She had been with her company for 12 years.

'My preference in a global account manager as someone who I might work with would be someone that I feel like I can partner with. That there is positive benefits on both sides and liability and accountability on both sides as well.'

Cust3.1

For GAM4

Cust4.1 was the IT Director based in the UK and was a senior person in the company responsible for IT. At that time there was no IT Director at Board level in the customer company. He had worked for his company for nearly ten years and knew GAM4 well.

For GAM5

Cust5.1 was a Chief Information Officer on the technical side of the customer's business and was one of three most senior key contacts that GAM5 had. At the time of the interviews he had just moved to the USA to take part in a special project. He had been with the company for over 5 years.

Internal Team Member Respondents

For GAM3

Int3.2 was a Client Manager based in UK and reported directly into GAM3. French by nationality she had worked for ComputerCo for eleven years and on the global account for 2 1/2 years. She was due to take over from GAM3 as the GAD during the next six months. She worked 100% on the global account.

Int3.3 was the former Service Director for the global account in EMEA and had just been moved to the US. He had first been involved in the account in 1995 before it had been designated a global account when he was asked to take on responsibility for the service management of the contract worldwide working alongside the then Client Manager.

For GAM4

Int4.2 was a Client Manager based in UK and had worked in the company for just over six years and had been working with the global account for four years. She had experience of selling hardware and systems solutions but had also worked on infrastructure support for some years. She now worked 100% on the global account for her part of the supplier organisation, dealing mostly with the Equipment and Facilities Group within the customer.

For GAM5

Int5.2 was also a Client Manager based in UK and had worked for the company for some five years. His background was mostly on the technical side of the business but he had moved into Client Management a year ago to broaden his career experience. He spent about 50% of his time on the global account.

Having looked at the background to the global account management programme, and at the profile of the respondents for Case Study 2, the role constructs for the global account manager roles, as they emerged from the ComputerCo data analysis, are now reported and discussed.

6.4 COMPUTERCO ROLE CONSTRUCTS

The ComputerCo role constructs as they emerged from the data are now presented and discussed. See paragraph 5.4 of the CourierCo case study for a description of how the role constructs were analysed. As is consistent with a literal replication study, the data from this second study were analysed against the same top level codes as the first case study (see Paragraph 4.4). The ComputerCo role constructs are shown in Table 6.1. As with CourierCo, these are presented in order of text unit count.

Table 6.1 ComputerCo Role Constructs: Count By Text Unit

Role Construct	Text Unit Count	Respondent Group			
		Org	GAM	Cust	Int
Goal Focused	17	√	√		
Financial	7	√	√		
Personal	5		√		
Non-Financial	5		√		
Customer Focused	86				
Developing New Ideas and Opportunities	31	√	√	√	√
Understanding the Customer	21	√	√	√	√
Building Strategic Relationships	17	√	√	√	√
Focal Point of Contact	12		√	√	√
Exchange of Best Practice	5		√	√	
Facilitating the Contract	0				
Internal Focused	71	√	√	√	√
Managing Internal Team	35	√	√	√	√
<i>Internal Team: Managing Team</i>	17	√	√	√	√
<i>Internal Team: Managing Virtual Team</i>	8	√	√	√	√
<i>Internal Team: Motivating Team</i>	5	√	√		
<i>Internal Team: Different Teams</i>	5		√		
Knowing Own Organisation	10	√	√	√	√

Customer Advocate	7		√		√
Providing Support	7				√
Managing Political Environment	5	√	√		
Exchange Best Practice Internally	4				√
Internal Consultant	3		√		
Facilitating Contract	0				
Finding Opportunities	0				
Account Planning Focused	16	√	√		√
Account Planning	12	√	√	√	√
Making Business Cases	4		√		
Spanning Focused	37	√	√	√	√
Managing Communication	21	√	√	√	√
Managing Culture	16	√	√	√	√
Total	227				

6.4.1 Goal-Focused Role Constructs

The goal-focused role constructs emerged from the Organisation and GAM interviews. Similar to Courier the GADs had specific targets and goals they had to achieve that were linked to the overall business objectives of the parent company which were largely financial goals, but they also had some customer-specific non-financial goals. They were not only targeted with delivering long-term revenue growth, but also with delivering long-term profitable growth. The global account managers also set themselves some personal goals which they wanted to achieve, and which like CourierCo's were not directly linked to the objectives and rewards systems.

In addition to these goals, there were a number of comments about short term versus long term goals. While GAM2 had mentioned that he wanted to keep a long term perspective on the relationship with the customer, the Organisation and GAD respondents in ComputerCo were far more explicit about the need to balance short term and long term goals. The *typology of goal roles* developed in Case Study 1 is

therefore represented at Figure with the addition of the short-term/long-term dimension.

Figure 6.4 Typology of Goal Roles

Goal Type	Formal/Informal	Short/Long Term
Financial	Formal	Short/Long
Non-financial	Formal	Short/Long
Personal	Informal	Short/Long

Financial Goals

Growing the existing business was one of the main reasons why the global account management programme was started. As discussed above, delivering long-term revenue growth and profitable growth were described as key deliverables for the GADs and one of the areas of incentivisation.

'For years we have been looking at revenue generation as the main measure. We had completely uncoordinated sales strategies where any business could sell to any customer. This led not only to customer confusion about who was dealing with what but also we found we were increasingly in situations where we were bidding against ourselves. We see the GAD role as being responsible for managing the overall revenue growth and to grow the profitability of the customer.'

Org2

The GADs themselves all articulated their responsibility for revenue growth and profitability:

'Myself and the SD [Services Director] are jointly responsible for the delivery of P&L.... We are jointly targeted for growing the revenue stream and for growing the profit.'

GAM3

'I am responsible for delivering the revenue growth, the margin and to maintain and improve customer satisfaction.'

GAM4

'We're measured on revenue generation and on profit and I also have some targets around looking after costs in terms of at least monitoring them.'

GAM5

As discussed above, as well as setting the financial goals the organisation also had an expectation that the GADs would look to identify long term goals and potential rather than simply managing the short-term revenue and profitability.

'We also want them to focus on the longer term potential rather than simply on the short term gains. This is never an easy task because the financial pressure in the organisation always comes from the next quarter's results, not from potential results three years down the line.For some people in our business one month is short term and one year is long term - we have to get away from this.' Org2

Non-Financial Goals

The GADs also described a number of targets or goals that needed to be achieved, some of which were not purely financial. Generally these goals were linked to special customer projects or, as in the case of GAM5, a target to make sure that key senior individuals met at least twice during the year, something which he had to facilitate.

'However, there are other things the organisation expects me to achieve. For example, with the customer we are working on a project to link our systems up more closely so the customer can have direct access to some of the information that is held on our systems. I have a target to deliver this by the end of the year.' GAM3

'And my third goal is basically to make sure that the [the person] who is their new senior guy meets at least twice with ours over the next year.' GAM5

Personal Goals

All three GADs described personal goals for things that they wanted to achieve with the customer.

'There are some things that I want to personally achieve with the account. I certainly want to be confirmed as a 'trusted partner' by the account across the world. I want to achieve sole supplier status in the US and the Asia-Pacific business. We are nearly there.' GAM3

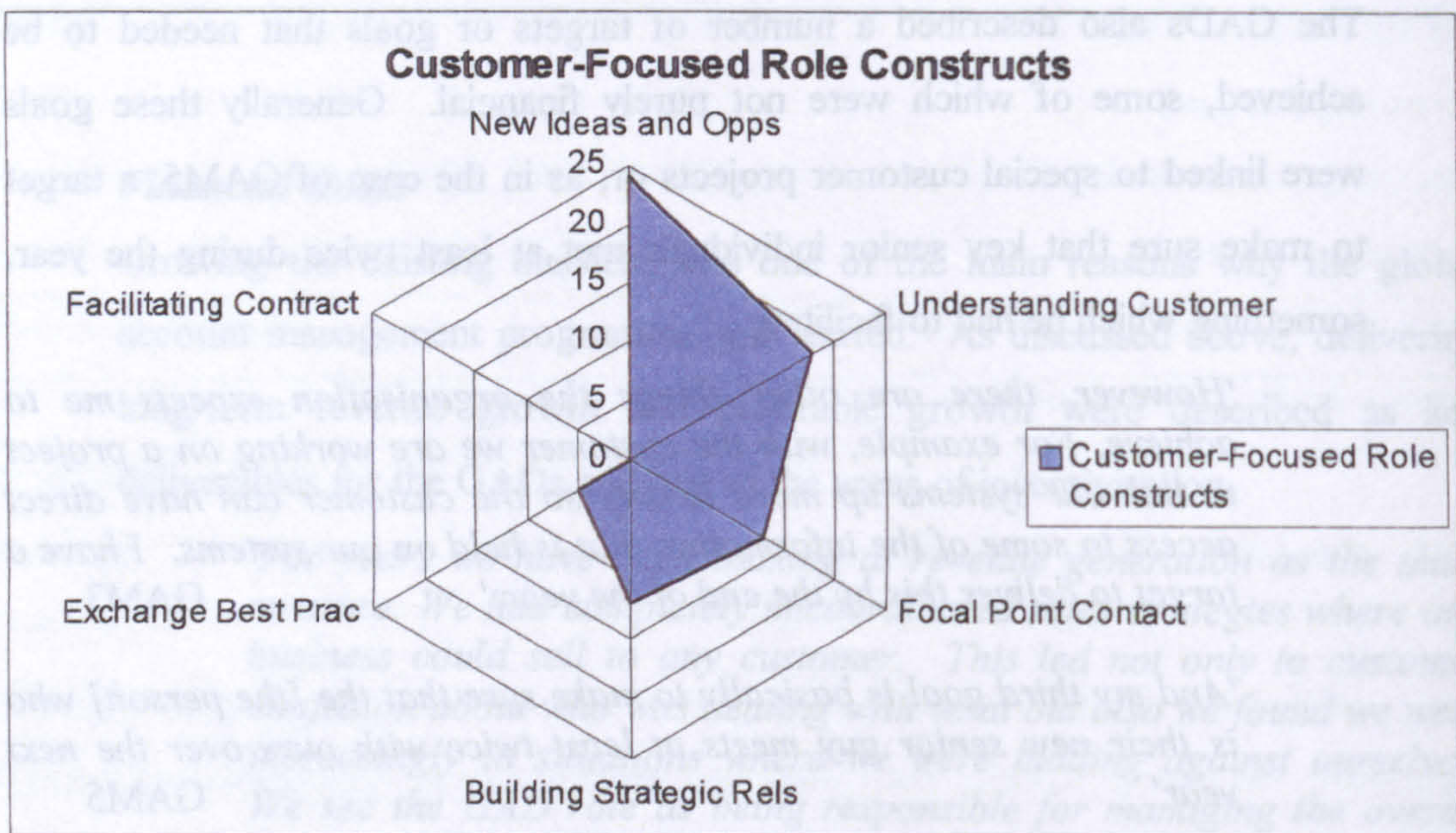
'I also have a personal goal of helping the customer to be truly global. I want to be a part of something moving forward and that is certainly happening at the moment.' GAM4

'There's a revenue goal I've got which is self-imposed but which I want to achieve. I want to get recognised partner status and my goal for the next year is to have that in place.' GAM5

6.4.2 Customer-Focused Role Constructs

Having looked at the goal-focused role constructs that emerged from the ComputerCo data, we now explore the customer-focused role constructs. The chart in Figure 6.5 represents the text unit count for each customer-focused construct.

Figure 6.5 Customer-Focused Role Constructs by Text Unit Count



The most mentioned customer-focused role constructs were the same three as those from the CourierCo case study. However, they were in a different order of magnitude. For the ComputerCo case study *developing new ideas and opportunities* was the most mentioned construct, whereas for CourierCo it had been *understanding the customer*.

Developing New Ideas and Opportunities

The *developing new ideas and opportunities* construct was not just found in responses from each respondent group, it was also mentioned by every single respondent in the ComputerCo interview set. In the CourierCo case study the following sub-themes emerged from the data:

- *The GAM as visionary*

- *The GAM as customer consultant*
- *The GAM as innovator*
- *Developing common business opportunities*

These sub-themes were again evident in the ComputerCo interviews. From the ComputerCo interviews, a fifth sub-theme emerged; *Developing bespoke solutions*.

As well as being in a position to see the big picture for the customer, the organisation respondent felt the GADs were responsible for being *innovative* and for developing new opportunities, either jointly with the customer or with others in the ComputerCo organisation, that could be presented to the customer.

'One way in which we can build growth going forwards with these global customers is for the GADs to be constantly looking for areas where we can add value for the customerthis means working with the customers to develop joint opportunities and also looking at our own organisation to see where opportunities are emerging that may be of interest to these customers' Org2

All three GADs saw this as a key part of their role, and one which was often driven by the customer's expectations. One of the GADs described this role in terms of being an *'unpaid consultant (GAM3)'*. The GADs also needed to be looking for ways to *develop bespoke solutions* for the customer that the competition could not emulate.

'This job is really about being an unpaid consultant to the customer. I need to bring solutions, float ideas, research the ideas and build proposals. There is a huge personal investment from the GAD who often has to work the solution himself.For example, however, tailoring components into a unique package for them can make it hard for competitors to simulate' GAM3

'Part of the role is to identify new opportunities as well - to look for better utilisation as well. I need to listen and understand and come up with something that adds value. They do not want to be sold to. They want to know what will bring them benefit' GAM3

'I have a guy who works for me, another account manager and together we look at developing propositions, business propositions for the customer. We have to find new opportunities for developing the business all the time.' GAM5

The GAMs also felt it was about being *visionary* and *innovative*.

'You need to be creative and innovative. You need to like building and enjoy the creation and development of something - not just winning the big deal.' GAM3

'Another main part of the role is being innovative - although you also have to be resilient and patient when things take time to come to fruition.' GAM4

'You mustn't be afraid to step outside the box either, although there does need to be a degree of pragmatism.' GAM5

The term *consultancy* was again used to describe one way in which the GAD should approach the relationship with the customer.

'The value the GAD really adds is around contributing to the strategy of the client and actually advising them and providing them with specialist skills and knowledge. So, it's a consultancy approach and needs to be creative, and creative with the customer, in terms of solutions.' Int3.2

GAM4 and GAM5 also saw this role as being very proactive and staying one step ahead:

'My role is to see opportunities and to add value by being one step ahead. I need to be finding the opportunities which leverage the capability of the whole organisation. It does need to be a mixture of 'good farming' with the existing business and 'good hunting' through being proactive with new ideas. It is also about being proactive and anticipating needs and requirements.' GAM4

'The customer wants us to be proactive and he wants me to enable him to be proactive in terms of coming forward with innovative businesses propositions.' GAM5

The issue of proactivity in this area was also mentioned by the customers:

'In terms of global account management, I don't want to have to tell a service organisation where I've got issues necessarily. I would really like for them to ultimately understand what the issues are. Again- it's back to being proactive as opposed to reactive.' Cust3.1

'It needs to be a very proactive approach, you know, to really look for opportunities - not simply reacting to what's happening day to day.And you know that has been the nature of the relationship with [ComputerCo]. It is day to day and is operational'. Cust4.1

The customers identified *developing new ideas and opportunities* as a key area of expectation in terms of the role of the global account manager and also in terms of looking for new ideas and opportunities that could also be *common business opportunities*.

'I saw an opportunity for us jointly, with [GAM3] to take a broader view of the capabilities of [ComputerCo] and understand what opportunities there might be for our two companies to partner in certain areas where we identified we had, in particular, complementary assets.You know, how we best fit together in terms of the relationship in a way that was different to the traditional relationship'. Cust3.1

'[GAM3] and I, well we were trying to look at joint business opportunities and the landscape for both organisations was constantly shifting - it was difficult, real difficult.' Cust 3.1

Finally, the internal team members also saw developing and recognising opportunities as part of the GAD's remit:

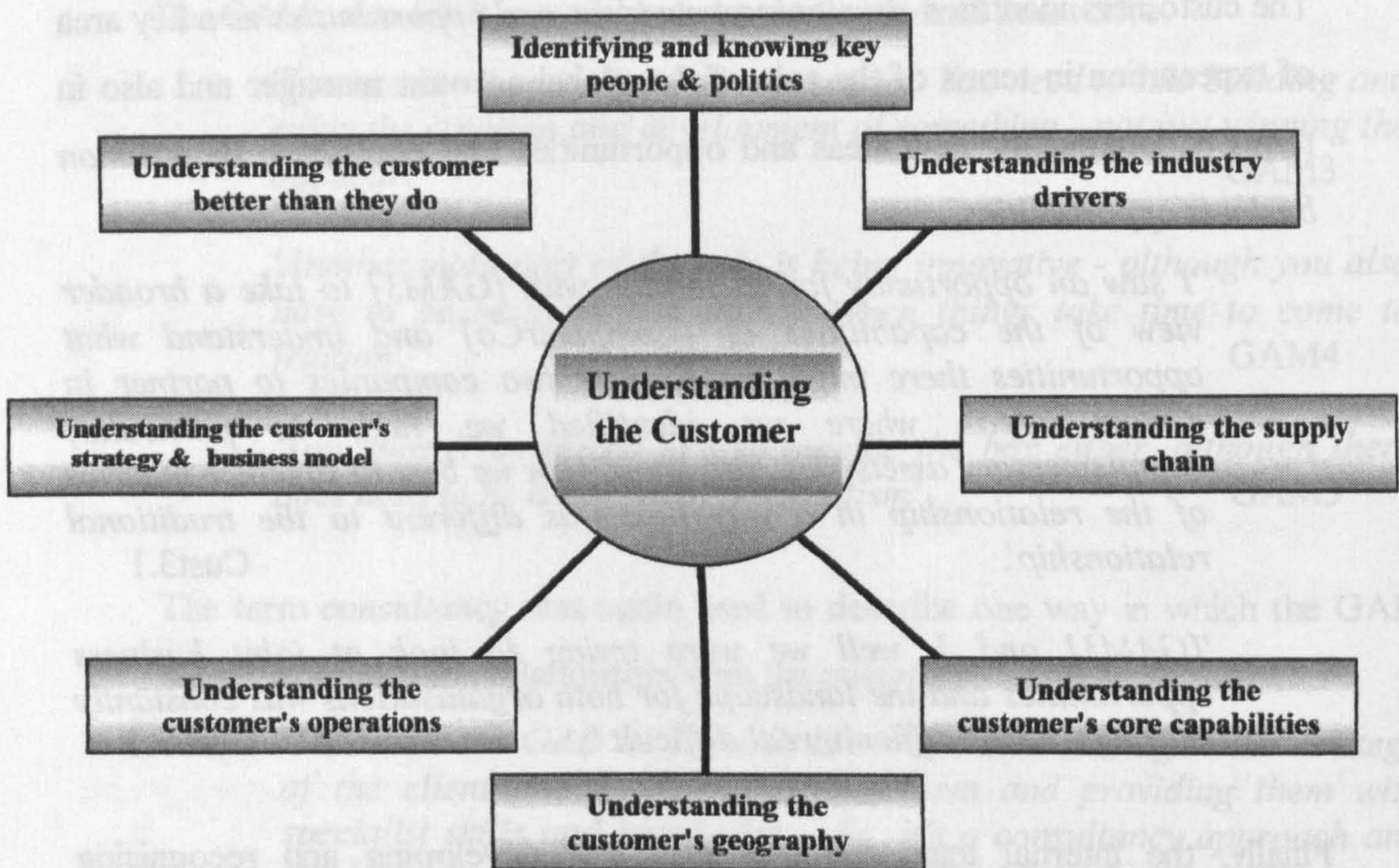
'A lot of the opportunities with the account came from the customer themselves. Where we are understanding their business, you know, we can see different ways, better ways of doing things that would help save them money or whatever and a lot of that type of development work would be in [GAM3]'s area'. Int3.3

'They need to be the ones taking the initiatives, coming up with things that can be developed and that they are able to spot the new ideas'. Int5.3

Understanding the Customer

This was the second most mentioned construct in the ComputerCo case study. In the CourierCo case study, a number of sub-themes had begun to emerge which were not categorised in that study. However, many of the sub-themes again emerged in the ComputerCo case study and are presented here as an initial list of sub-themes which may, if necessary change and develop as the subsequent case studies are explored. The eight sub-themes are presented in Figure 6.6.

Figure 6.6 Understanding the Customer Sub-Themes



The organisation respondent expressed the view that one of the key things that the GADs 'brought to the party' was that they were the people who understood the customer's needs and requirements best, particularly in terms of seeing the big picture. The GADs also needed an in-depth understanding of the customer if they were to be really effective in their role.

'They have the big picture for the customer across our businesses. Within the businesses and the industry divisions, they can generally only see the customer from their narrower point of view'. Org2

'The global customers can be very complex organisations to manage. Only by having an in-depth knowledge of the customer can they really be effective in their jobs'. Org2

Many of the sub-themes illustrated in Figure 6.6 were expressed by the GADs in their comments:

'I know them better sometimes than they know themselves.They value my understanding of their own internal politics. I have to understand where their weaknesses are and where their strengths lie

not only in relation to their industry and competition but also in relation to [us].I need to take a holistic view of the [customer] - know the nuances of the customer' business.I also need to know where the power bases in [the customer] are both in Europe and in the US and Japan.I need to understand what drives them'. GAM3

'I need to have an in-depth knowledge of [the customer] - what are their drivers and problems from both the business and the IT perspective. To do it effectively I need to maintain and update the information and keep abreast of technical and organisational developments. GAM4

'One of the key activities that I have, is understanding the direction that [the customer] has. What business issues are they facing? Where is it likely that we can help them, you know, support their businesses. It's understanding the strategy, understanding the requirements and then being able to reflect these back both to the customer and within [ComputerCo].So, it's knowledge in the market place, knowledge of industry trends, and obviously knowledge of what we plan to do'. GAM5

'You also need a good knowledge of their organisation, because you do need to know and understand their internal politics'. GAM5

'He expects me to understand what his strategy is and what his business dynamics are'. GAM5

All the customers saw this a key area for the global account managers. The customers expressed that only by understanding the customers' businesses could the GAMs be really effective in identifying where, for example, the mutual benefits might be.

'On the really positive side, [GAM3] was actually really trying to understand our business in a lot of depth and then to identify those areas where we could benefit from each other from a business predominant standpoint'. Cust3.1

'I think it is really important that the interfaces in global account management are ones that are proactive - understanding not only the customer's business and their strategic direction but also as well, understanding the strategic direction of their own company. You need to understand where the points are, where you can derive mutual benefit from each other, based on your respective strategic direction and on both your core competencies and strengths'. Cust3.1

'We needed [GAM4] to really understand the business we are in, you know, sometimes we don't know and then we need to try and align the goals of each of our respective organisations'. Cust4.1

'It is a question of the [GAM] knowing how to find the right match of expertise to support us'. Cust5.1

As with the customers, the internal team members also saw this as a key part of the GAM's role.

'It's about essentially looking at where we can help them, how we can assist them in whichever direction they want to go. We need to assist [the customer] in creating the environment to let's say meet their own objectives and also understanding their goals and strategy, to try and help them with offerings from us.I do not take this role on myselfit's the role that [GAM3] has been very, very good at'. Int3.2

'I would expect him to communicate customer information back to me. It would be very much both ways because it's like intelligence gathering if you know what I mean. We'd each pick up bits from various meetings with customer contacts and discuss them together'. Int3.3

'[GAM4] has a very good knowledge not just of the customer but of the whole aircraft and airline industries and business generally. I think this is what makes him such a success with the global customer. He has so much experience and knowledge which is invaluable to them'. Int4.2

A good customer understanding was also felt by one respondent as necessary in order for the GAD to speak to the customer's in the customer's language.

'They need to have a really good knowledge on the customer, I mean it sounds obvious, but I think there are quite a few account managers who don't understand the customer's business well enough. I think if you don't understand the customer's business you can't really manage what we can do for them well enough. You can't put it in a language that they understand. We need someone who's diligent enough to take time to understand the customer's business'. Int5.3

Building Strategic Relationships

A number of the sub-themes for the *building strategic relationships* construct that emerged from the CourierCo case study were again found in the ComputerCo data. For example, building *long-term* strategic relationships was seen by the organisation respondent as a key requirement of the GADs, particularly as it was recognised that the customer relationships had not always been as strategic as perhaps they should have been.

'When we started looking at the possible global accounts in some depth, we were shocked at the level of the interfaces that we had with the customers. Where we should have been talking at board level we found that the key relationships and interfaces resided much further down in the organisation. They certainly weren't strategic'. Org2

The GADs expressed the requirement to build *multiple-level relationships* throughout the customer's organisation but also suggested that relationships with the customer needed to be at a *global relationship* level as well. The GADs also mentioned a number of activities undertaken by the GAD to facilitate the building of the relationship.

'I need to build and manage a number of interfaces globally. At Board level - well I know every member of the [customer's] European Board and most of the US Board. At Board level we look at the long-term goals, how we can be proactive, even wild ideas. But I also need to keep in touch with people who are one or two levels down, particularly in terms of day to day problems. They provide a sanity check for some of our bigger propositions. I also go out with their engineers to their customers'.

GAM3

'Once a year we go with our immediate team to their employee conference where their Board presents to their workforce their strategy for the next few years. Sometimes, we have this knowledge in advance of the Conference. I have also built the relationship so that I have access to the European Board when I need to.This has developed over time - I'm now personal friends with some of them.The important thing is that I now have a security pass so I can drop in informally as well as formally'.

GAM3

GAM4 had developed a *customer engagement model* which he used to build the customer relationship.

'The customer engagement model is about developing one organisation between ourselves and [the customer]. This is a big challenge from an internal perspective but if you can get all the capabilities lined up then few can compete'.

GAM4

The customers saw the requirement for building strategic relationships that were based on *trust*, but that this could take time to build. This point also raised the issue of continuity of global account managers.

'I think it takes a lot of time to get that level of trust with us, the customer. So I guess a point I haven't made earlier is that I think continuity of global account managers is important. I don't think you can change that position annually or whatever. I think it took two

years before [GAM3] was really trusted by usIf it's a big customer, like us, and it's global it does take time'. Cust3.1

All of the internal team members were very clear that it was the GAD's role to manage and build the strategic relationships with the customer and, in particular, where good relationships did not exist.

'[GAM3] is more concentrated on setting the vision as head of the strategy for the account and building the relationship at that level. [GAM3] has been an adviser to their board and their board have actually asked him to come and present on various subjects. It really is at that kind of level'. Int3.2

'What [GAM3] did was develop the relationships at senior level with the customer. We were working on different time horizons if you know what I mean, with [GAM3] taking the longer term view and preparing for where we would set objectives in the future.....He would be the forward looking one, the planning side of it and working with the customer and developing their thinking.What I expected from him was to develop the senior level relationships into areas where we didn't have good relationships'. Int3.3

'[GAM4] has the high level contacts and is very much looking at finding new solutions for the customer for the future while I tend to deal with people at the more operational level on a day to day basis'. Int4.2

'I get stuck in the operational things where it's problem solving on the day. A lot of really short term scale type things whereas, what is expected of the GAD, is to develop the longer term issues and having those types of future conversations with the customer and getting to the right people within the customer's organisation, which can take quite a lot of time and development'. Int5.2

Focal Point of Contact

In complete contrast to the CourierCo NGAMs, all of the ComputerCo GAMs saw their role as being a focal point for the customer. This was described in terms of being both the focal point and, again, the escalation vehicle for problem solving.

'When there is customer discontent then I am the ultimate escalation point - not for day to day problems, but for the big issue escalation'. [One of the customer's customers] is a good example of a company who likes to escalate problems. Through better account management this has largely stopped coming up to me except where big issues occur and then it does'. GAM3

'I am the main point of contact for escalation if things go wrong. But, it is more than simply reacting. I need to see where things can potentially go wrong and anticipate the problems. I also need to be proactive internally and spot things before they become problems.'

GAM4

'You are really the single point of contact where the trust is built and maintained and the customer knows they can trust you to deal with things and get back to them.They trust you to follow through, and they also trust you to tell them if you can't do something.It's all part of developing the relationship.'

GAM5

GAM5 made the point that the customer was looking for a single point of contact that was also a similar point of contact i.e. one that the customer knew he could talk to.

'The customer is not just looking for a single point of contact, he is looking for a similar point of contact that he knows he can talk to on the same level.'

GAM5

From the customer's perspective, being the main point of contact meant also being seen as the *'united front'* of the supplier's organisation.

'I think it's good to have that focal point. We make people crazy with the different structures within our organisation, the various interfaces and who's responsible for what. And people change positions here quite frequently so I think it's good to have, I think it's actually good to have that role, you know that focal point on either side. There are key people that [GAM3] can interface with, or key people that we would interface with and you know, it is helpful to have clearly defined key interfaces. It just helps to facilitate business interaction overall.'

Cust3.1

'Obviously, for me they are my main point of contact at the strategic level and I will use the [GAM4] if I need to escalate issues and problems or even opportunities. I also see them as the united front of their organisation which is what I want.'

Cust4.1

'But it is about having that focal role at a strategic level, because you may have lots of people interfacing with your organisation but they are focused on the day to day issues. So it's nice to have an individual who can really step back and look at the strategic direction and develop the business relationship versus just reacting day to day.'

Cust5.1

It was also seen by the internal respondents that the GAD was the main contact with the customer at strategic level.

'[GAM3] is the main contact in terms of the relationship with the customer.He is the one who owns the relationship. He has the board level contact while I have contacts with their divisional directors.' Int3.2

'From the customer's point of view he is the single key point of contact to facilitate access to our three businesses so that they don't have to deal with them individually.' Int4.2

Int3.2 went on further to endorse that fact that the focal point needed to be at the strategic level and that the GAD needed to be the last resort and not the first port of call.

'When you've owned an account for so long, as [GAM3] has, the customer tends to go directly to, you him. It's trying to sort of make things pretty clear to the customer that really [GAM3] is the last resort and not the very first point of contact.' Int3.2

Int3.3 saw this as being important from the internal perspective as well.

'Someone's got to see the big picture, it's very easy to get fragmented and it's quite a complex area, so you need someone who can really take the helicopter view and see through a lot of information and get an overall picture. There are so few people in the organisation who actually have that picture.They need to be the focal point for the customer from our perspective as well.' Int3.3

Managing the Exchange of Best Practice

As part of the development of new ideas and opportunities above, Cust3.1 also saw the GAD role as being in a position to transfer opportunities that ComputerCo were developing with other customers in different industries to their industry.

'One example is that ComputerCo were working with [a major mobile phone company] on a project and [GAM3] felt that once the development work was underway that perhaps there would be some technology that we might be able to use in the travel industry and even, you know, we might become the travel distribution point for some of the technology.' Cust3.1

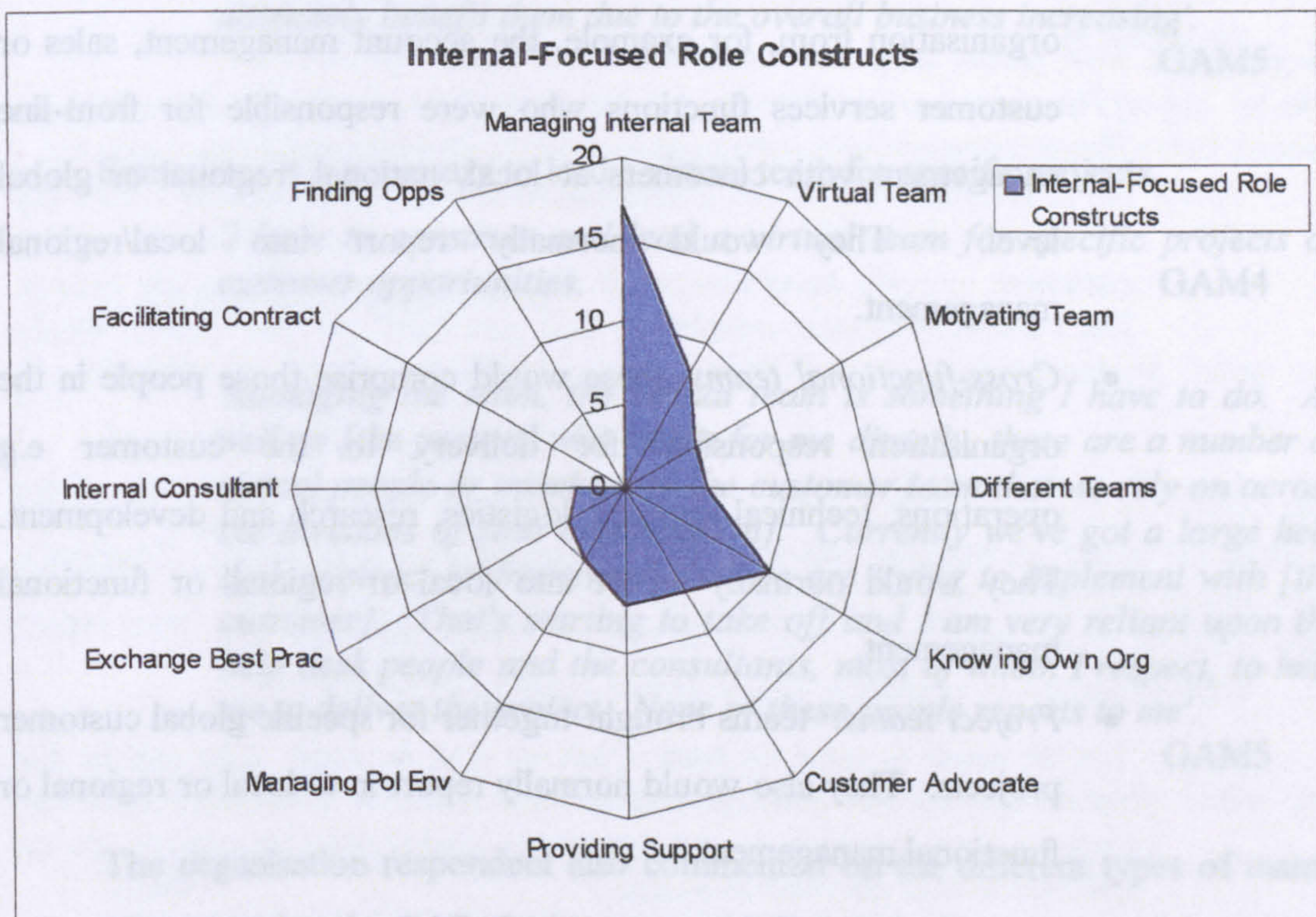
Cust5.1 also saw this as an aspect that jointly applied to their role as well as the GAM role.

'We also need to educate each other's organisations in terms of key interfaces around our respective strengths and, you know, potential opportunities.' Cust5.1

6.4.3 Internal-Focused Role Constructs

Having explored the customer-focused role constructs that emerged from the analysis of the ComputerCo interviews, the internal-focused role constructs are now presented. Figure 6.7 represents the text count for the internal-focused constructs.

Figure 6.7 Internal-Focused Role Constructs by Text Unit



Managing the Internal Team

Like CourierCo, this construct has the highest text counts of any of the constructs from the ComputerCo data. The internal team leadership in ComputerCo was a mixture of direct team leadership and then virtual team leadership of the broader team. Although two of the GADs did have direct reports working with them on the customer relationship, they did not have a directly reporting team. Therefore, all the rest of the people that they were

reliant on, in terms of delivery for the customer, were reporting into somewhere else in the organisational structure. As with CourierCo, the two sub-themes of *managing the virtual team* and *motivating the team* were evident, but in this case study, two other sub-themes became evident; *managing different teams* and *developing the team*.

As well as directly reporting and non-directly reporting global account teams, it emerged that global account teams could be constructed in a number of ways:

- *Customer account teams*: these would comprise those people in organisation from, for example, the account management, sales or customer services functions who were responsible for front-line engagement with customers at local, national, regional or global level. They would normally report into local/regional management.
- *Cross-functional teams*: these would comprise those people in the organisation responsible for delivery to the customer e.g operations, technical services, logistics, research and development. They would normally report into local or regional or functional management.
- *Project teams*: teams brought together for specific global customer projects. They also would normally report in to local or regional or functional management.

While not strictly an internal team, there were also other examples of teams that had customer involvement or which were led by customers. GADs could find themselves leading or being involved in any of the above types of team. They also often described these teams as *virtual* and that they had to *motivate* the teams.

'We have a [ComputerCo] virtual team meeting every six months which isn't virtual but face-to-face, if you see what I mean. Often the customer is there as well. We report on progress and discuss new ideas with the wider team'.

GAM3

'Motivating the account team and the virtual team is very important and the most important element in getting this is good communication. You have to put things in personal terms. I concentrate on focusing on the senior internal interfaces which I try to manage face-to-face and [my colleague] focuses on the wider virtual team'. GAM3

'I need to create, lead and facilitate the virtual team and support their interfaces with the customer.This means preventing conflict, facilitating internal trading and resource utilisation. GAM4

'The other factor to bear in mind is that I operate a virtual team'. GAM5

'I need to be decisive and I need to be seen to act as a leader.I have to find the best way of motivating people. Sometimes it has to involve compensation issues, but sometimes it has to be because you have persuaded them to believe that what we are trying to do will ultimately benefit them due to the overall business increasing'. GAM5

Sometimes it is necessary to lead a virtual team for specific projects.

'I have to construct and lead a virtual team for specific projects or customer opportunities. GAM4

'Managing the team, the virtual team is something I have to do. As well as [the person] who works for me directly, there are a number of virtual people or members of the customer team that we rely on across the divisions of [our organisation]. Currently we've got a large help desk contract or framework that we are trying to implement with [the customer]. That's starting to take off and I am very reliant upon the help desk people and the consultants, most of whom I respect, to help me to deliver the project. None of these people reports to me'. GAM5

The organisation respondent also commented on the different types of matrix structures that the GADs had to cope with in terms of team management.

'They are reliant on getting people to work with them. We have for a long time worked in different kinds of matrix structures.This is a difficult one, since most of those they rely on, well, they are generally reporting into the industry heads at the business level. The GADs do have to be good at developing their internal relationships. Org2

Another example is that of GAM3. GAM3 has a small team but also has to work closely with the Services Director (SD) whose people are responsible for providing a lot of the day to day service to the customer. The situation is made more complex by the fact that although the GAD is seen as *leading the*

team in terms of the customer focus, the SD is at the same organisational level as the GAD.

'The service management team is now well developed. There are some 35 people who are closely involved with the customer and another 245 who are responsible for delivering the service to the customer across the world. Myself, the SD and our direct reports tend to manage the strategy. This team of four is completely key. We actually believe the team should be recruited jointly it needs to work so well'. GAM3

As already discussed, some of the GADs had a small support team of one or two people to help them manage the account more effectively on a day to day basis. The GADs were also responsible for *developing* some of these people in terms of providing a line of succession to the GAD and thus continuity for the customer.

'[The customer] is big enough for us to have a small dedicated team. This gives continuity through the peaks and troughs in the business. I am developing one of my colleagues in terms of succession - possibly two years down the line she may take over management of this customer.We need this small dedicated team to act as the bridge. The customer expects continuity and you can't get this with a wholly virtual team'. GAM3

As well as the GAM3 seeing a role for team development, the idea of the GAM being an internal *coach* (which was also expressed in the CourierCo data), was mentioned. This was against the background of the direct report being groomed as a possible future global account manager.

'Yes, he needs to lead the team, both me and the wider team and he has the virtual team to manage, but he also needs to be a coach. He can show us what it means to operate at the global level and how to be an effective global account manager'. Int3.2

'[GAM3] has to be a leader. You've got to be visionary'. Int3.2

'Obviously being good at managing internal relationships is equally as important and being a good team leader - it's a critical part of the job'. Int3.3

'He spends much of his time on the internal perspective sorting out internal aspects and supporting [ComputerCo] team members. To be fair I had no previous experience of working at a global level until I started working with [GAM4] and from a positive point of view what he does is extremely good - he really is 'playing a blinder'.

Int4.2

Managing the internal team was also seen by the customers as a key focus for the GADs and also one of the most challenging.

'Sometimes to get these relationships to work, the difficulty for them is in getting the rest of the organisation, indeed both organisations behind what you are trying to achieve'. Cust3.1

'One of the biggest challenges for them, I guess, is getting the levels of service up from across the other businesses. [GAM4] doesn't have a team of people directly supporting him so I guess that makes it difficult. He has to manage a lot internally'. Cust4.1

'[GAM5] has a small team working with him on our account, but the relationships go much wider, and he needs to know who to go to in his organisation, when things go wrong, or when we need some, you know, specific expertise'. Cust5.1

'The [GAM] needs to be someone who gets along with a variety of individuals and is good at interfacing at various levels of the organisation and to be comfortable with that and to make other people in the team feel comfortable'. Cust5.1

Knowing Own Organisation

Again, all four respondent groups identified this construct as being an important constituent of the GAD's role.

'They need to have a good feel for [our] capabilities and how these can be combined into total solutions for the customer.It is not always easy in our businesses and especially across the businesses to mobilise our capabilities in a co-ordinated way. ...it is also about knowing who to mobilise'. Org 2

The customers also felt it was important for the GAMs to really know and understand their own organisation in the same way that they needed to know and understand the customer's organisation. *'They need to understand the strategic direction of their own company as well'. Cust3.1*

However, respondents were not as clear in articulating what the GADs' understanding of their own organisation needed to be as they had when they were articulating what the GADs' understanding needed to be of the customer organisation. The internal team members gave the clearest views.

'The GAD needs a very good knowledge of [ComputerCo] and its constituent businesses and needs to interpret the knowledge and information in a way that can help me to do my job better'. Int4.2

'The GAD needs a good knowledge of their own organisation, the strategy, focus, and definitely offerings. We need him to be familiar with what [we] are about at all levels and we look to him to facilitate this information'.

Int3.2

Customer Advocate

Unlike the CourierCo NGAMs, the GADs did see that they had a role as the *customer advocate*. It was, for example, felt to be important by GAM5 to sell the customer organisation internally.

'And obviously with the relationship that we have, they also look to me as a potential opportunity to influence our people internally about what they are trying to achieve'.

GAM5

With the customers, the comments focused on the requirement for the global account manager to be able to articulate the customer's needs back in their own organisation and also to act as some sort of *voice* of the customer.

'I do have an expectation that the [GAM4] will represent our interests back in their organisation. This is very important when we are looking to start new projects which may have a resource implication for [ComputerCo].And I think it goes beyond that even to sort of being our, you know, voice within the supplier's organisation'.

Cust4.1

'Not everyone in their organisation knows what we are about. You know, it is very difficult with such a complex organisation. They need to be fighting our corner for us'.

Cust5.1

Providing Support

The internal team members were the only respondent group to mention the *providing support* construct. This was the same as the CourierCo respondents and, as with CourierCo, the internal team members saw the GADs as being in a position to help and support them with what they needed to achieve for the customer. In this case study the internal team members also interpreted this as the GAD *opening doors* for them both in their own organisation and with the customer.

'My critical success factors are first, to help the customer achieve their growth.The second would be to reduce the cost of servicing while optimising revenue for [us].And the third would be to assist them

in bringing new services and helping them through any transition in their business. Helping them to provide a world class service. I would look for help and support from [GAM3] in helping me to do my job in support of these critical success factors.

Int3.2

'I want help and advice on sales campaigns, strategy, who the key individuals are and their psychology, their personalities, maybe historical information. A lot also is just general business management approaches that I need to know about.How do I take customers through an account planning session'

Int3.2

'You are looking for them to protect you in some respect. If you're on the service side of the fence you do need them to not take things on that are going to get you into difficulty. So, you need someone who is going to listen as well and not have a 'gung ho' sales approach'.

Int3.3

'[GAM4] is very supportive in many senses. He makes sure we are working to the same objectives for the customer and he also makes sure the right information is going to the right places at the right time and is getting in front of the right people'.

Int4.2

'He is also extremely good at opening doors for me both in [the customer], and in my business and [ComputerCo] at strategic level. He facilitates meetings with the customers (particularly if I am having difficulty), which we often attend together, whoever is taking the lead.He is extremely supportive and it is good to know he is there'.

Int4.2

'I expect him to open doors for me which will help me'.

Int5.2

Managing the Political Environment

This construct was identified by the organisation respondent and the GADs.

GAM4 said:

'It is all about managing the internal politics.'

GAM4

The GADs had to be good at reading internal situations and good at working within them.

'The GADs can only really be successful if they are good at reading internal situations and are good at recognising when and where they can apply pressure and create leverage. They are reliant on getting people to work with them'.

Org2

But while they needed to be good at managing the internal politics it was recognised that it was not a good idea to be a *political animal*.

'Of course we have to recognise that there are politics and to some extent we have to know how to operate within the political environment. You have to do this to survive. The trick is to try to do this without playing politics yourself... it is very difficult, though.... You have to avoid being a political animal in this job!' GAM3

While this construct is referring to the GAM's internal political environment, GAM5 also recognised that knowing and managing the customer's political environment allowed him to facilitate the customer's internal relationships.

'Another aspect is that I can help them with their internal politics because they've recognised that in the role that I have, I sometimes have access to people within their own organisation that they don't. I can help to facilitate their relationships internally!' GAM5

Being an Internal Consultant

Finally, the last internally-focused construct to emerge from the ComputerCo data was that of the *internal consultant*. Only the GAM respondents mentioned this as an aspect of their role. For example, GAM4 saw himself as an internal consultant and as a catalyst for change.

'I am a catalyst for the organisational changes going forward - a crusader if you like. I have to keep fighting for the organisation. [ComputerCo] will need me to be an internal consultant to make this thing work!' GAM4

6.4.4 Account Planning Role Constructs

Having looked at the internal-focused role constructs, the account planning focused role constructs are now explored.

Account Planning

The organisation has a structured planning process for customers. All CMs and GADs have to produce customer-focused business plans that look at long-term as well as short-term opportunities. There was also an expectation that

the plan should be a document that was developed and agreed jointly with the customer.

'The customer business plan is a key document. We have a three year view on the plan. At the global level, in particular we are looking for customer involvement in the plan.The account plan is important as it feeds the resource plans and the investment plans'. Org2

As outlined above, the organisation has an expectation that all CMs and GADs produce a business plan for the customer. GAM3 saw the plan as a prime vehicle for building the relationship and for managing the relationship. His plan was developed and agreed with the customer.

'This is a confidential document between [the customer] and ourselves. Because it is so honest it is restricted on both sides to the key parties. However, the action plans and development plans are shared more widely with all those involved in the relationship. The account plan does not say 'I am going to sell...'. It does say that I am going to get this business offer in'. GAM3

'[The customer] has seven key goals and I map the plan onto these in terms of how we can help them to achieve their goals for them'. GAM3

The other two GADs also produced account plans, which they either shared all of, or some of, with their respective customers.

'I produce a group-level account plan for the customer which covers all three of our businesses. You need to spend enough time on it and keep it a live document. Keeping it a 'live' account document is a real challenge. But the plan needs to be the nub of it - it needs to be at the centre.....It is a rolling three year plan which we revise at our major account planning session once a year'. GAM4

'We do have an account plan for the customer, which we have in part developed with the customer. We have had to be a bit selective because in some areas they know we are involved with their competition. But, as far as I'm concerned that's fine - you've got to start from somewhere, and then we'll build on that, and the more that they can see we're helping them, hopefully the more open they will be as well.Quite a bit of the time you are involved in both understanding the what customer's business plans are but also reflecting that in business plans internally '. GAM5

Internal team members expressed their view that the main responsibility for building an account plan for the customer resided with the GAD.

'Although we jointly build a customer development plan with the customer and I am involved, it is [GAM3]'s job ultimately to set up the customer facing account plan'. Int3.2

'We had formal and structured account planning sessions where we'd have more people present that [GAM3] led. Int3.3

'I saw the account plan as the vehicle that gave me the overview of what we were hoping to achieve with the customer when I first started this job a year ago. It told me a lot about the customer very quickly. Int5.3

Making Business Cases

This construct was mentioned by the GADs. For example, GAM5 said that part of the job was about taking an opportunity to management internally in order to get approval for resources.

'Sometimes we have to take an opportunity to the management to get approval for resources and to get permission to proceed with the project. So, I'm usually involved in making the business case - it depends on the size of the opportunity and whether there is someone else in the business who could handle it. It's knowing who the key contacts are internally'. GAM5

Sometimes the GADs also had to make business cases to customers when joint development was needed.

'We have to sometimes make a case to the customer's, for example, European Board for resources for joint projects. [Cust3.1] and I had to do this last year. At this kind of level of operation you have to be able to build and present a good financial case for the investment'. GAM3

6.4.5 Spanning Role Constructs: Customer and Internal Focus

The spanning role constructs and their sub-themes are explained in paragraph 5.4.5 and in Figure 5.7.

Managing Communication

This construct, as with the CourierCo case study was seen by the respondents as a key construct in terms of the GAM role. GAM4 and the customer respondents expressed another facet to the role constructs and sub-themes, and

that was, that the communication they had to manage could be, like the goal constructs, *formal or informal*.

'It's all about communication - whether it's formal or informal. I have to manage it.....most of all it is about managing the internal communication' GAM4

'I want them to not only identify and tell us what's wrong but to have a plan that will communicate to me as a customer on how they're going to fix it or how we can fix it together.And it should be very open, two way communication. It doesn't have to be something that formal' Cust3.1

As with the NGAMs in the CourierCo case study, the GADs needed to be *managing strategic communication*.

'They expect me to brief them on [us], our strategies and changes. Also the IT marketplace - the industry and market trends. They want to know what is happening in their wider market so that they can then have the discussion on how it affects them.' GAM3

'As well as having a good technical expertise I think you have to then communicate it, in all guises, across the customer network' GAM5

Different Communication Media were also mentioned in this case study, such as the need to recognise that different types of people needed different types of communication so the GADs had to be good at both *verbal* and *written* communication.

'Communication with the customer both written and verbal need to be strong. There are different communication types for different people. I am also talking about managing a communications campaign inside [the customer].' GAM3

Being the *information manager* and being able to communicate information clearly was important. As well as providing the right information it was also important for the GADs to be good at communicating.

'Communication definitely - communicating things clearly and crisply is essential' Int3.2

'I need to persuade people internally and articulate in their terms what they need to achieve for the customer' GAM4

'He has to manage the communication, he's the main channel for us' Cust4.1

'Good communication by [GAM5] is critical. It is the glue that cements the relationship'. Cust5.1

The internal team members also thought that it was the job of the GAD to be *the information manager* and bring everything together about the customer and to give them the information they needed to carry out their roles successfully.

'At this global level they've got to be the ones to pull things together, bring it together and convince people internally that we should drive the relationship forwards.There is no turn key solution, you know, off the shelf to do this. We need the right information and knowledge of the customer to do our jobs.He needs to bring us valuable information'. Int3.2

'It would work very much both ways. We'd be depending on [GAM3] for knowing what's coming on track, what sort of areas should we be looking at going forward.He's depending on us because we would have a lot of real information about what is happening on the ground, if you know what I mean, about the customer.This way we would often have more information than the customer may have about themselvesour structure if you like was such that we would often have more information about the customer's organisation being fed back to us centrally that they had'. Int3.3

In one instance it was felt to be an important enough issue that it warranted a communications plan.

'As a result of implementing a major contract, I am now working on a communications plan to sit alongside the marketing and customer plans so that everyone involved knows what we are trying to achieve. GAM3

GAM3 also felt that part of the role was to carry out *internal marketing*.

'I am increasingly doing internal marketing and internal selling. In a way we are in competition with the other GADs and CMs. I have to prove that [my customer] is the best proposition for them in meeting their targets. This involves some campaigning with country management because for the customer we are only as good to them as the weakest link - they want a global commitment'. GAM3

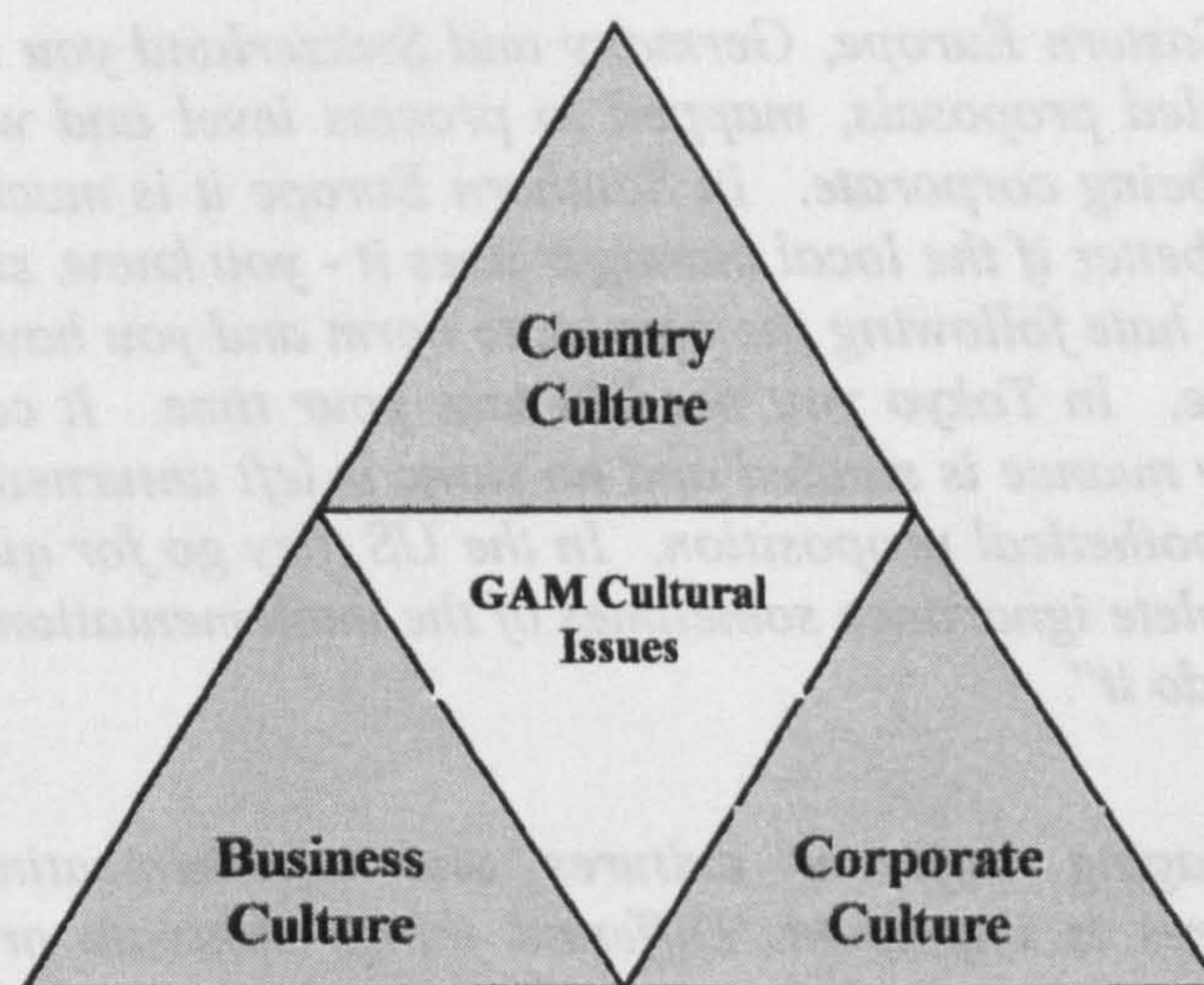
The GADs used a variety of communication tools such as email, face-to-face team meetings, some involving the customer which were held on a regular

basis. Like CourierCo they used the internet and their internal systems for communicating globally both internally and with the customers.

Managing Different Cultures

This again emerged as an important aspect of the GAM's role. In the discussion of this construct in the CourierCo data analysis, three sub-themes were illustrated in Figure 5.7. These were *country culture*, *corporate culture*, and *business culture*. These three sub-themes of culture as they relate to global account management are represented in Figure 5.8. It was revealed that only two of the sub-themes actually emerged from the CourierCo data. The third sub-theme, *corporate culture*, was described in this case study.

Figure 6.8 Cross-Cultural Issues in Global Account Management



Cust3.1 explained that it was not just different national cultures that were an issue in global account management but also different *corporate cultures*.

'It is important in global account management that global companies can talk together and this has some implications for cross cultural issues. This is not only in terms, you know, of different national cultures that exist but also down to understanding different corporate cultures. You know, our corporate culture in London is very different from our field offices across Europe and very different from our HQ environment in the States.' Cust3.1

Country culture or national culture was also recognised as a possible cause of problems for GAMs

'Culturally we tend to be very American and aggressive and the good thing about [GAM3] is that he is very measured and has a very mild manner. I do wonder sometimes if he doesn't give a perception of maybe not being assertive enough in his approach. I don't know again how much of that may be differences culturally. He knows and has worked in many cultures and he will have the same cultural challenges within his own organisation'. Cust3.1

This view was nicely supported by a comment from one of the internal team members who was involved in the global customer relationship.

'Well, the challenge, particularly when you are dealing with this customer is that they are very American, you know, very centralised and it doesn't match directly with [our] cultureSo, you have to manage that'. Int3.3

GAM3 also described how the different cultures of the customer impacted the way business was done.

'In Eastern Europe, Germany and Switzerland you have to build very detailed proposals, mapped to process level and written. They also like being corporate. In Southern Europe it is much more about feel. It is better if the local manager does it - you know, strike a 'local' deal. They hate following the corporate norm and you have to pander to this desire. In Tokyo you need to take your time. It can take months as every nuance is studied and no stone is left unturned. They don't want a hypothetical proposition. In the US they go for quick decisions with complete ignorance sometimes of the implementation implications - it's 'just do it''. GAM3

'Managing different cultures and communicating with different cultures is important. Different things motivate or worry them and certain styles work better with some than with othersTailored communication can work but this is hard and misinterpretation can happen'. GAM3

However, one respondent saw this as an extremely important part of the role in the sense that the GAD needed to be portraying an international image for ComputerCo. This was seen as an important part of managing both the customers and the internal team and one that was not always done as well as it should be.

'Portraying the international message of [ComputerCo] is very important. I suppose you can tell from my accent that I am French and I speak 4 languages and I know I have an understanding of the cultural

aspects as well. Unfortunately amongst the client management this is not always so. But understanding the cultural aspects of the relationship is very important.Different countries have completely different attitudes to business'.

Int3.2

'It is very important at the international level that you are not just operating as a centralised strategic person but that you can talk to local managers and show you understand the local specialisms and the local culture.

Int5.2

6.5 FURTHER ANALYSIS AND DISCUSSION OF CASE STUDY 2

The role constructs for ComputerCo have now been presented and discussed and a few comparisons and contrasts have been made with the first case study. However, it is not intended to carry out a full cross-case analysis at this point between each of the individual cases as they are presented, but as is usual when reporting a multiple case study, the main cross-case analysis takes place after the within-in case analyses have been presented (Yin 1994; Carson et al. 2001). This can be found in Chapter 9.

Throughout the reporting of the within-case analysis of this case study, a number of observations were made about the data and some further models and data displays have been presented particularly in relation to the sub-themes of the core role constructs.

In concluding this within-case study of ComputerCo, some further observations on the data are now made.

6.5.1 An Analysis of The Role Constructs by Respondent Group

As with CourierCo, there was sufficient data for the ComputerCo respondents to produce an analysis of the customer-focused role, the internal-focused role, and the spanning-focused role constructs, by respondent group. The results of these are shown at Figures 6.9, 6.10 and 6.11 respectively. The numbers for the goal-focused and account planning-focused roles constructs are again too small to meaningfully represent them as a data display.

Commentary on Customer-Focused Role Constructs

From a study of Table 6.1 and Figure 6.9 it is clear that there is a congruence of views from all four respondent groups on the most mentioned customer-focused role constructs which in this case study were *developing new ideas and opportunities*, *understanding the customer*, and *building strategic relationships*. *Developing new ideas and opportunities* was the only customer-focused construct expressed by every single respondent in the case study, which suggests that this was very much in the

minds of the respondents. There is also congruence between the CourierCo respondents and the ComputerCo respondents as these were also the top three customer-focused constructs in the CourierCo case study. However, the order in each case differs as follows:

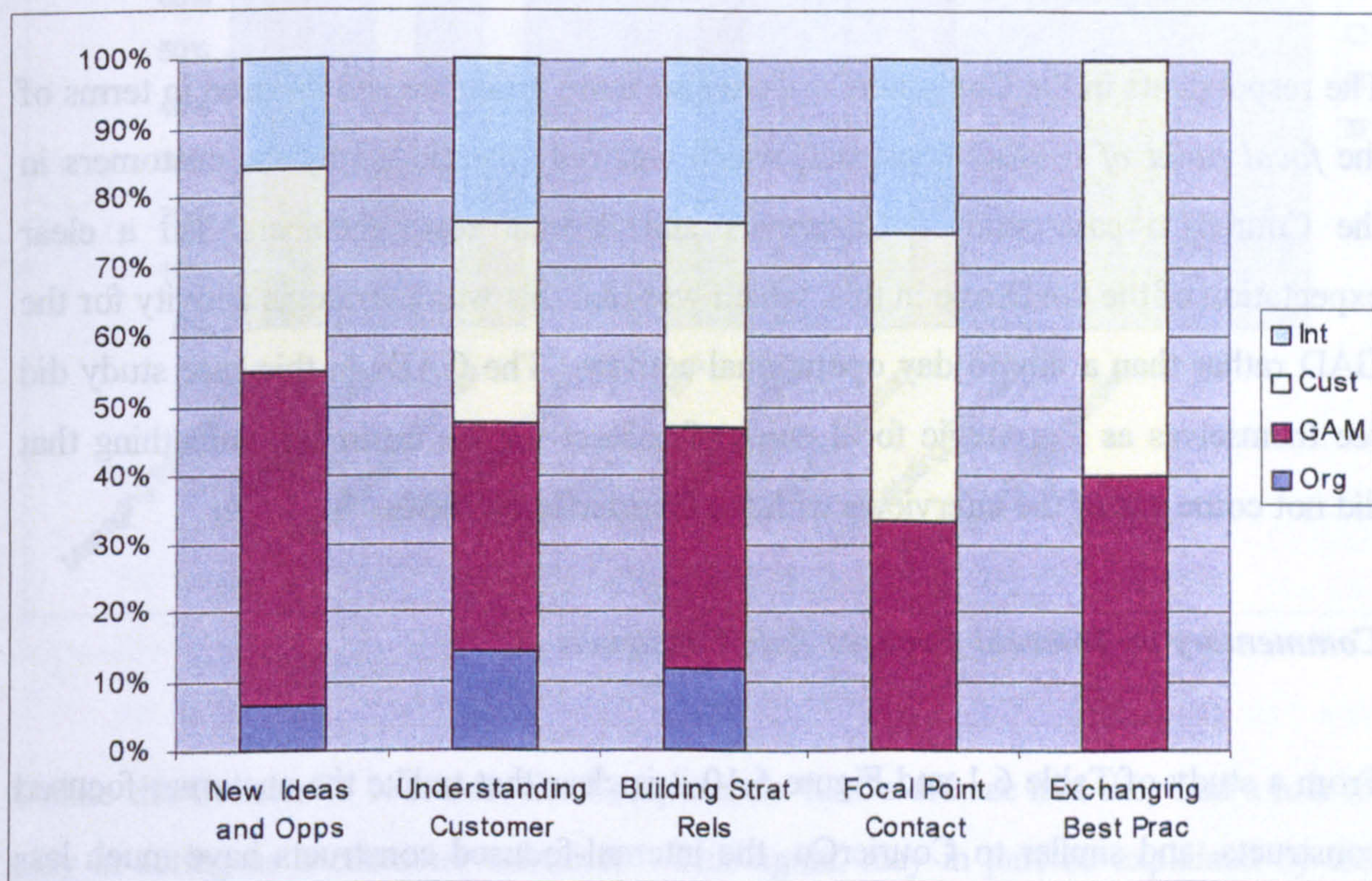
CourierCo

- Understanding the Customer
- Building Strategic Relationships
- Developing New Ideas and Opportunities

ComputerCo

- Developing New Ideas and Opportunities
- Understanding the Customer
- Building Strategic Relationships

Figure 6.9 Customer-Focused Role Constructs by Respondent Group



While it is difficult to explain the differences with such small numbers involved, one explanation is that, while CourierCo may be more advanced in its implementation of its global account management structures and systems, ComputerCo actually has more strategic relationships with the three global accounts that were studied than CourierCo do with their two global accounts that were studied. Being in a position to *develop new ideas and opportunities* is arguably the most strategic activity of the

customer-focused role constructs. For example, it is unlikely that you could do this activity if you haven't first built a strategic relationship or understood the customer to some depth. ComputerCo respondents also used the words *strategic* and *long-term* more times than the CourierCo respondents.

None of the ComputerCo respondents expressed anything that supported the *facilitating the contract* construct. An immediate conclusion is that this is a context specific construct. However, ComputerCo did have global contracts with these three global customers. Therefore, one explanation is that the contracts are well bedded in, and that the relationships with the customers are now at the level of talking about more strategic activities. This would, in part, also further help to explain the issue in the previous paragraph.

The respondents in the ComputerCo were also more articulate and focused in terms of the *focal point of contact* construct, which was only mentioned by the customers in the CourierCo case study. Customers and internal team members had a clear expectation of the GAD role in this, which was that this was a strategic activity for the GAD rather than a day to day operational activity. The GADs in this case study did see themselves as a strategic focal point of contact for the customer, something that did not come out of the interviews with the CourierCo NGAMs

Commentary on Internal-Focused Role Constructs

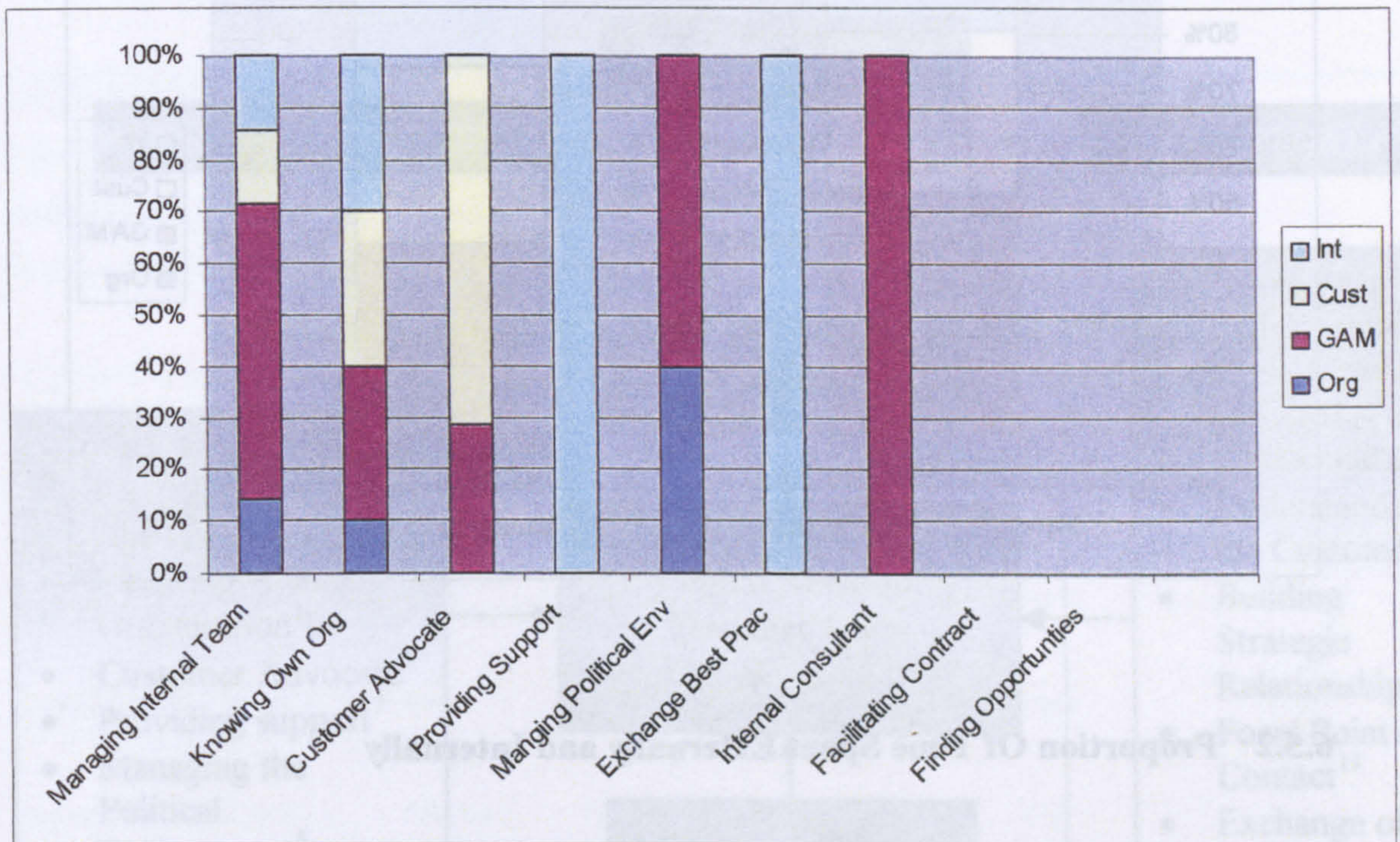
From a study of Table 6.1 and Figure 6.10 it is clear that unlike the customer-focused constructs, and similar to CourierCo, the internal-focused constructs have much less congruence among the four respondent groups. However, all four respondent groups did express views about *managing the internal team* and *knowing own organisation*. All the other constructs have emerged from either one or two respondent groups. The management of the internal team again emerged as a major role construct for the GAM.

As above, in the customer-focused role, *facilitating the contract* was not mentioned explicitly as an internal activity by any of the respondents. A possible explanation for

this has already been given above. *Finding opportunities* for internal team members was another construct that did not emerge from the ComputerCo interviews.

In a mirror of the CourierCo case study, however, the ComputerCo internal respondents were again the only ones to express that *providing support* was a role construct for the GAM.

Figure 6.10 Internal-Focused Role Constructs by Respondent Group



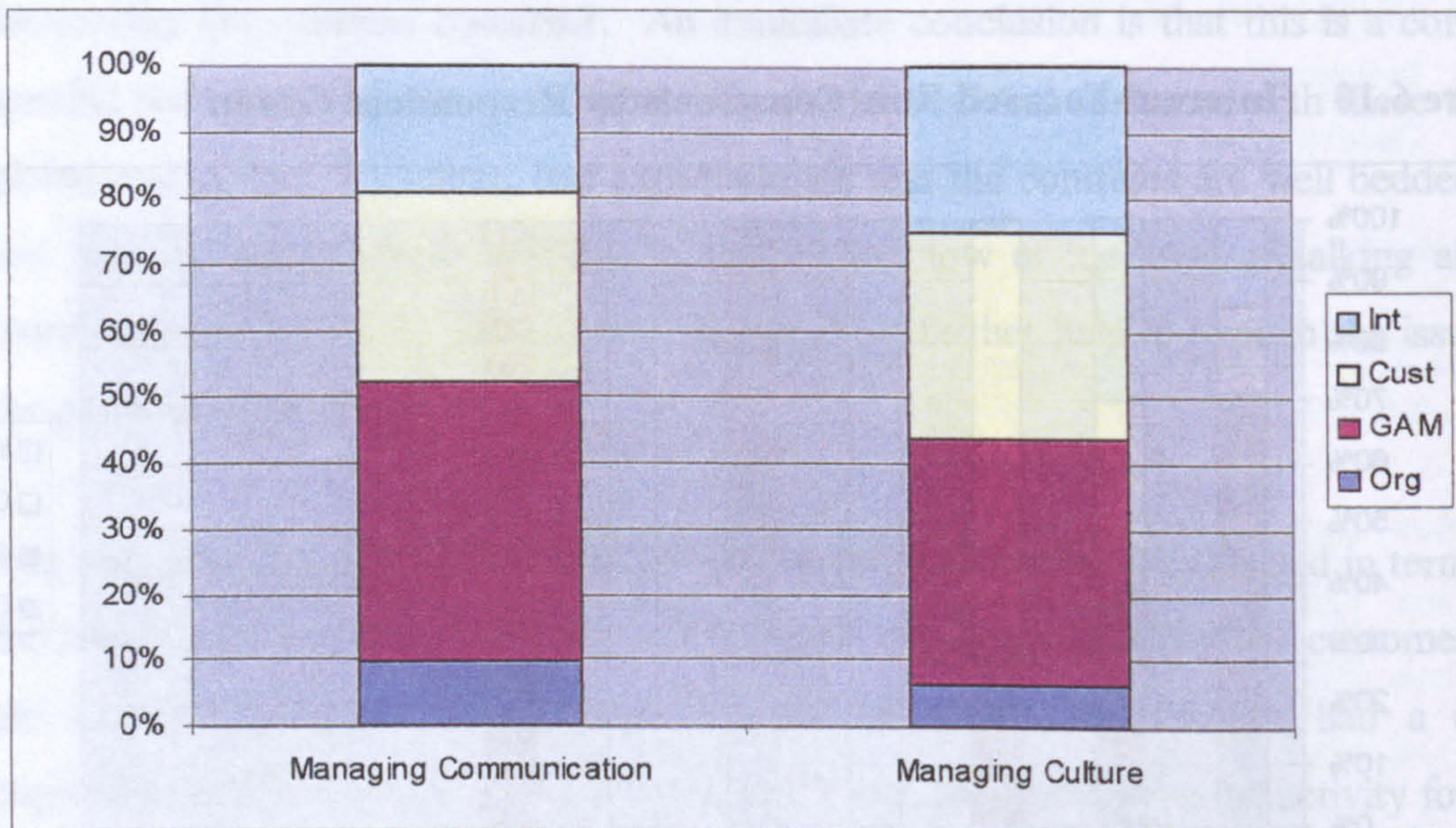
Unlike the CourierCo NGAMs, the ComputerCo GADs did see that they had a role to play in acting as a *customer advocate*. This again, may in part be explained by the point made above that the GADs in the ComputerCo case study

Commentary on Spanning-Focused Role Constructs

Figure 6.11 represents the spanning-focused role constructs by respondent group. As with CourierCo, all four respondent groups discussed these two constructs. This case study made further contributions to the sub-themes of these constructs. In particular, the addition of *corporate culture* as a sub-theme to the *managing culture* construct

enabled the researcher to provide a preliminary model and data display of the three key aspects of cross-cultural management that global account managers need to be aware of and manage.

Figure 6.11 Spanning-Focused Role Constructs by Respondent Group



6.5.2 Proportion Of Time Spent Externally and Internally

As with case study 1, Figure 6.12 shows how the GAMs in case study 2 estimated their time was spent.

Figure 6.12 Estimated Time Spent By GAMs on Different Aspects of their Role

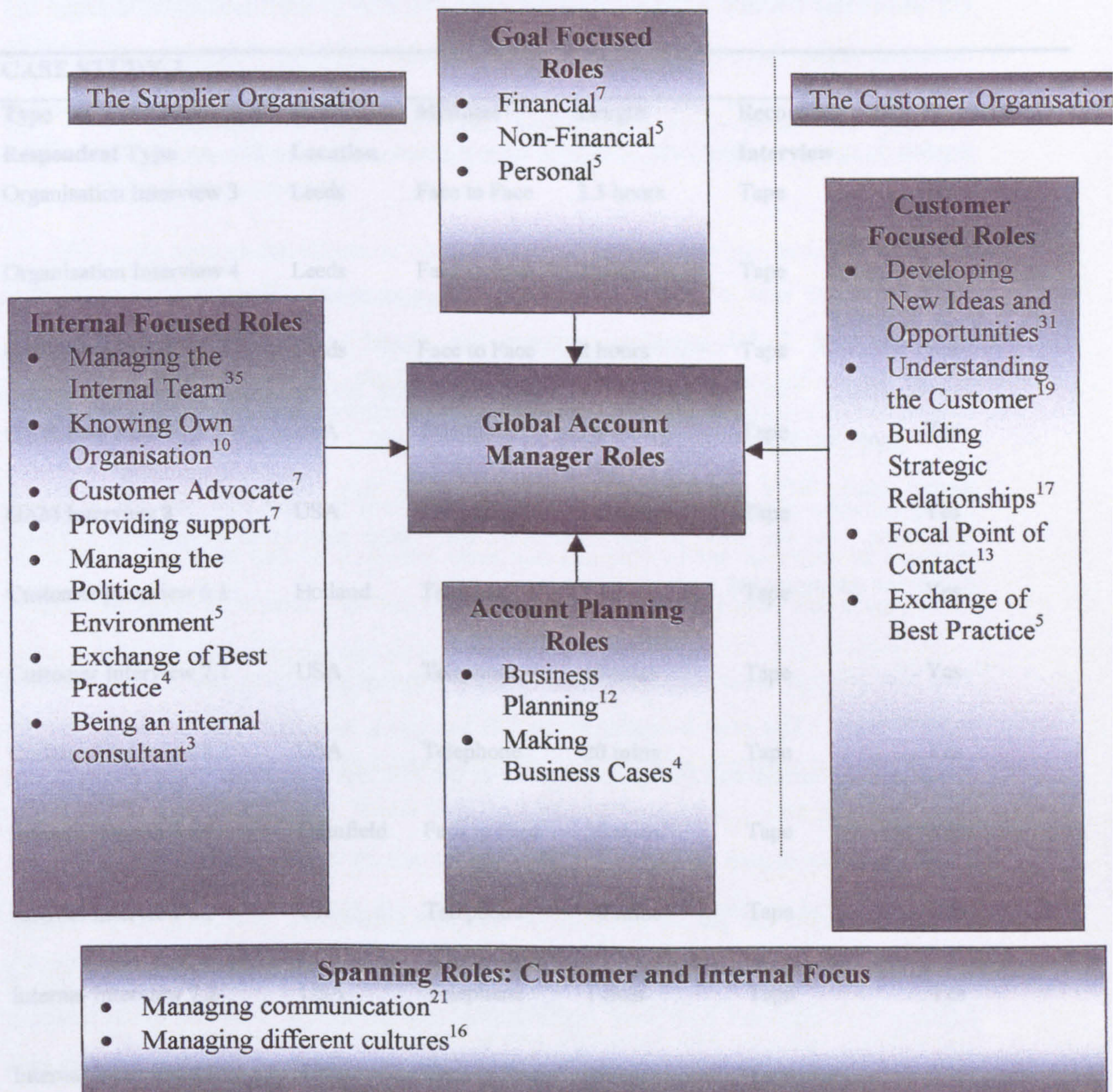
	Customer-Focused Roles	Internal Roles	Focused Account Roles	Planning
GAM3	40	55	5	
GAM4	35	64	1	
GAM5	30	65	5	

This point is explored further in Chapter 9 in the cross case analysis and discussion.

6.5.3 Summary of Role Constructs Identified In Case Study 2

Finally for Case Study 2 a summary of the roles against the conceptual framework is presented in Figure 6.13. This shows the full range of role constructs identified by all the respondents in this case study. They are presented in text unit count order with those carrying the most text units at the top of each role category.

Figure 6.13 Summary of Role Constructs Identified in Case Study 2.



Having discussed the findings from the second Case Study in Chapter 6, Chapter 7 now discusses the data from the third Case Study, ComponentsCo.

CHAPTER 7: CASE STUDY 3: COMPONENTSCO

7.1 CASE STUDY 3: RESPONDENT INTERVIEWS

This chapter contains the within-case analysis of the data from the third case study; ComponentsCo. The respondents in this case are shown in Figure 7.1

Figure 7.1: Case Study 3 Respondents

CASE STUDY 3						
Type of Interview by Respondent Type	Interview Location	Medium	Length	Recording of Interview	of	Transcribed
Organisation Interview 3	Leeds	Face to Face	2.5 hours	Tape		Yes
Organisation Interview 4	Leeds	Face to Face	2 hours	Tape		Yes
GAM Interview 6	Leeds	Face to Face	2 hours	Tape		Yes
GAM Interview 7	USA	Telephone	1.5 hours	Tape		Yes
GAM Interview 8	USA	Telephone	1.5 hours	Tape		Yes
Customer Interview 6.1	Holland	Telephone	1 hour	Tape		Yes
Customer Interview 7.1	USA	Telephone	40 mins	Tape		Yes
Customer Interview 8.1	USA	Telephone	20 mins	Tape		Yes
Internal Interview 6.2	Cranfield	Face to Face	50 mins	Tape		Yes
Internal Interview 6.3	UK	Telephone	40 mins	Tape		Yes
Internal Interview 7.2	USA	Telephone	1 hour	Tape		Yes
Internal Interview 8.2	UK	Face to Face	1 hour	Tape		Yes
Total: 12	4 countries	4 face to face 8 telephone	15 hours	All		All

7.2 CASE STUDY BACKGROUND

ComponentsCo was the third of the case studies in the project. ComponentsCo is a global player in the components distribution market. They do not manufacture components but act as a distributor of vital parts for industries around the world basically on a next day delivery basis or even shorter timescales. They have expanded rapidly by growth, but also by some major acquisitions of similar companies in the US and in the UK and Europe. The different, but very complementary businesses are managed under the overall umbrella of the parent company. Between the various businesses they cover most of the world; North America, South America, Europe (which is split into Northern and Southern Europe), Asia Pacific, and Australia/New Zealand.

To give some idea of the global size of the operation. They had over 360,000 products and 3,000 suppliers around the world, who they were constantly rationalising. They had nearly 4 million customers and generated over 2.5 million catalogues worldwide in several different languages. Over 50% of the staff on a global basis faced the customer full time every day, either face to face or by telephone. At the time of the interviews they were shortly to implement a Siebel customer management system.

The two biggest businesses have had account management programmes in place for over 5 years. The core business in the US has got a National Account Management (NAM) programme and the core business in the UK has a Key Account Management programme.

However, within the parent company it was recognised that following, in particular, the acquisition in the US, that the company was now in a much better position to manage the customers who were multinational and global e.g. who had manufacturing sites in different countries across the world. The Organisation respondent explained how the global accounts were defined and selected by the senior management team of the parent company.

'We got the senior management team together and we spent some time defining what we saw as an international or global corporate account. One of the main criteria was that the customer themselves was organised for purchasing on a centralised as opposed to a decentralised basis. Also we looked at their own desire for being handled on a global basis. The fact that they had asked us to maybe bid on a global basis and also the fact that we could clearly identify champions for us within their business. The main difference with the global accounts was that we made a strategic decision to put specific resource in place to manage them on a global basis. So, we ended up initially picking five global accounts'.

Org3

The main driver for the programme was a recognition that for the truly global customers

'Our goal with the global account management programme is to generate profitable sales through co-ordinating all the trans-national sales effort with these chosen accounts'.

Org3

As well as the five global accounts the company also had many international accounts that were services at the individual business level.

'It's not to say that these are the only accounts that we deal with internationally, that's absolutely not true, there are dozens, if not hundreds, but you have to start somewhere in the global account management process.'

Org3

In many respects the structure was very similar to that of ComputerCo with the global accounts residing at parent company level and the rest of the accounts at business level. The main difference was that the parent company in this case was a very small team of senior managers plus the global account teams.

At the time of carrying out the interviews in 2001/2002, the company had established three of the global accounts, which they had been running for a year and they were just about to add two more to the global portfolio, making five in all. One of the global accounts was run from the UK and the other two from the US. The global account programme had already reaped results according to one of the customers:

'[ComponentCo]'s business, for example, this year has grown 25%. There aren't many suppliers who have grown that level with [us] The trend is still upwards so I guess they're doing something right and we're doing something right, and [GAM6] is doing something right'.

Cust6.1

The company did see that the number of global accounts might grow in the future mainly due to customer-driven pressures. The Organisation respondent felt that the customers were often *ahead of the game* in globalising their supplier relationships.

'We're also seeing that customers increasingly want to consolidate their purchasing powers so that they get the best deals but also they want to know that they will get the same levels of service in every country. So, the big customers are getting bigger, the big customers are rationalising their supply base, and they are wanting more sophisticated relationships. While we are putting together an effort to globalise our account management, the customers are often ahead of the game in putting together their global supply strategies'.

Org3

The global account managers were located near to the customer's location where the key decision-makers resided in relation to [ComponentCo]'s business, rather than simply where the customer's HQ was.

'Global account managers should be based in the country where the headquarters is perceived to exist in relation to our business. For example, [EngineeringCo], although it's a Dutch company the specific individual that champions global accounts for their particular range of products is here in the UK, so we've put the global account manager here in the UK and not in Holland'.

Org3

The three global account managers reported into the Global Corporate Accounts Director based in the UK. Given that two of the global accounts were in the US this was queried with the respondent. The response was, that not only was the parent company located in the UK but also that the UK is in a very good geographical position in terms of time zones.

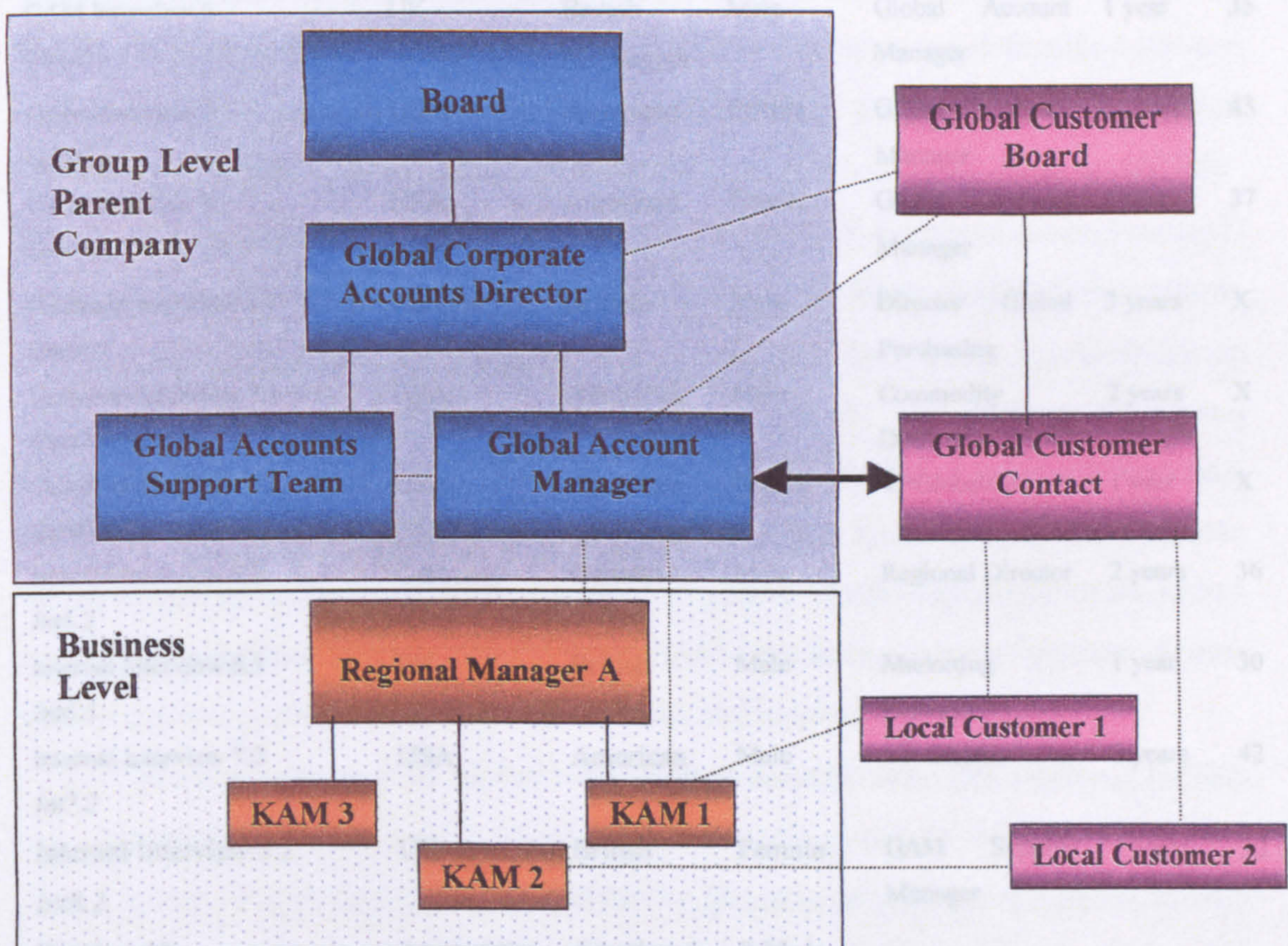
'Although I myself come from the US and it would be easy for me to be located there, I recognise that being in the UK makes sense for me in terms of managing the global account management programme. I can talk to people at the end of their day in Asia-Pac and then to Europe during the day and then at the end of our day I can talk to the States. In global terms it's a good geographical position'.

Org3

A typical organisation structure for managing a Global Account is in Figure 7.2. The global account managers were supported by a small team, which included a business and customer and market information analyst and a marketing manager. These were both based in the UK. The GAMs in this case study do actually have the title of Global Account Manager (GAM).

Compared to the previous two case studies, ComponentsCo were very new to the concept of global account management as they had only been actively running the programme for one year at the time of the interviews, although they had been planning the programme for a year before that. They had, however, been running with a key account management programme for five years and were members of the Key Account Management (KAM) Club at Cranfield. In this respect they were very familiar with good practice principles of key account management. They were also heavily investing in the global account management programme. The Organisation respondent had been in his role for two years and had spent a year setting up the programme which had included talking to and visiting companies who had, in the words of the respondent, *a bit of a track record* in global account management.

Figure 7.2: A Typical Organisation Structure for Managing a Global Account



As the company, at the time of the interviews, only had three designated global accounts they were managing on a global basis, these were the accounts that were included in the research project.

7.3 CASE STUDY 3: RESPONDENT PROFILES

The attribute data recorded for this case study was identical to that described in paragraph 5.3 of Case Study 1. The attribute data profiles for the ComponentsCo respondents are shown in Figure 7.3.

Figure 7.3: Case Study 3 Respondent Profiles: Attribute Data

CASE STUDY 3							
Respondent Type	Work Location	Nationality	Gender	Job Title	Time in Current Job	Age	
Organisation Interview 3 <i>Org3</i>	UK	American	Male	Director Global Corporate Accs	2 years	44	
Organisation Interview 4 <i>Org4</i>	UK	British	Male	Director Global Operations	2 years	47	
GAM Interview 6 <i>GAM6</i>	UK	British Norwegian	Male	Global Account Manager	1 year	35	
GAM Interview 7 <i>GAM7</i>	USA	American	Female	Global Account Manager	1 year	43	
GAM Interview 8 <i>GAM 8</i>	USA	American	Female	Global Account Manager	1 year	37	
Customer Interview 6.1 <i>Cust6.1</i>	Holland	British	Male	Director Global Purchasing	3 years	X	
Customer Interview 7.1 <i>Cust7.1</i>	USA	American	Male	Commodity Director	2 years	X	
Customer Interview 8.1 <i>Cust8.1</i>	USA	American	Female	VP GlobalOps	1 year	X	
Internal Interview 6.2 <i>Int6.2</i>	Germany	German	Male	Regional Director	2 years	36	
Internal Interview 6.3 <i>Int6.3</i>	UK	British	Male	Marketing Manager	1 year	30	
Internal Interview 7.2 <i>Int7.2</i>	USA	American	Male	VP Globals	2 years	42	
Internal Interview 8.2 <i>Int8.2</i>	UK	British	Female	GAM Supplier Manager	1 year	32	
Total: 12	4 countries	4 nationalities	8 Male 4 Female				

Organisation Respondents

This case study, uniquely, had two organisation-level respondents who both worked at the parent company level.

Organisation respondent 3 (Org3) was the Director for Global Accounts and was based in Leeds in the UK, although his nationality was American. He had worked for the company for three years. His career had mostly been in sales and business development type roles in the USA and Europe, and his current role had firstly been to set up the global account management programme at ComponentsCo and now he was driving it forward with the first three global accounts. He reported directly into the parent company Board.

He was very enthusiastic about the programme and what he perceived as its success thus far. He had put a lot of personal effort into getting the programme up and running and was receiving a lot of backing from the Board.

Organisation respondent 4 (Org4) was the Director for Global Operations. He worked closely with the Director for Global Accounts on all aspects of operations for the three global accounts. He had worked for the company for three years and was a purchasing professional. He had two global roles. One was to support the Global Accounts Director on the supply issues for the global accounts and the other was to continue the organisation's drive for global supplier management where this was appropriate. His responsibility was to continue to rationalise the supplier base and to actively identify those suppliers who could supply ComponentsCo on a global basis.

Global Account Manager Respondents

GAM6 is based in the UK, the other two GAMs are based in the US.

GAM6 had worked for the company for two years. He had been an officer in the army until 1995 and had then worked for a 2 major pharmaceutical companies before he joined ComponentsCo as a Corporate Account Manager. He had then moved

across to the global account team where he had been for a year. The customer of GAM6 is a major global engineering and electronics company with over 200 manufacturing sites worldwide. Its HQ is in the Netherlands but its central purchasing organisation is based in the UK. They were the first customer to be designated a global account for ComponentsCo and the GAM had been involved in managing the relationship from the beginning.

GAM7 had been with the company for a little over twenty years, having joined them in 1980. Her career had mostly been in sales and sales management. However, she had spent some time as a regional manager taking on responsibility for operations as well. Most recently she had been a national account manager before being appointed to the global account manager position at the same time as GAM6.

The customer of GAM7 is a global mobile telecommunications company. They had been a global account for nearly a year at the time of the interview. The GAM is located in Denver. Prior to them being designated a global account they had been a National Account in the US for some 20 years. She had a very pragmatic view of the job which she said was the hardest she had ever done. When asked what would help her to make her job more effective she responded with:

'The one thing that would make my job even more effective? Well [pause] fairy dust?'

GAM7

GAM8 had been with the company for ten years and like GAM7, her background was in sales and national account management. She was based in Atlanta. Her experience was all within North America although she regularly visited her customer in other parts of the world. She said that she and GAM7 kept in touch a lot by phone about their respective global accounts, swapping ideas and helping each other.

'Because we are both global we discuss a lot of things internally. I'll pass something by herI'll say to her - I have this situation, have you ever come across this before? The closeness with the other GAMs is important.....We are a team within ourselves. We bounce a lot of ideas off each other. It's really good that the GAM team is so close.'

GAM8

The customer of GAM8 is a global engineering company covering a wide range of activities whose HQ is in the US. Again they had been treated as a global account for nearly a year.

'I think the customer's really looking for somebody they can work with...somebody to have as a partner' GAM8

Customer Respondents

For GAM6

Cust6.1 was the Director Global Central Purchasing in the MRO (maintenance, repair and operations) division of his company. He managed an international team who looked after all the MRO global contracts. He had been personally involved in the driving ComponentsCo down the global account management route. At the time of the interviews he was based in Holland on a six month project. Prior to that he was based in the UK as that was where his company had its global MRO HQ.

He had been with the company for just over three years and had spent his career in a variety of jobs, not just purchasing, including sales management.

For GAM7

Cust7.1 was a Commodity Director for consumable products. Her job was to find good matches for her company where it was possible to bring in a global agreement. She had worked on the relationship with ComponentsCo for two and a half years. She had a very good working relationship with the GAM.

'She and I talk about our families and our dogs. But we still keep it really professional when it is about the business. But we do get on well on a personal level' Cust7.1

For GAM8

Cust8.1 was a VP Global Manager in commodity purchasing and sourcing for his company. His role was strategic and global. His main focus was on electronic, electrical and mechanical components. His responsibility, like that of Cust7.1 was to find suppliers who could take the cost out of the purchasing process through being able to supply on a centrally managed global contract.

(NB: this interview was extremely short and was incomplete due to the respondent being called away urgently. In spite of several tries it proved impossible to complete the interview).

The Internal Team Member Respondents

For GAM6

Int6.2 was the Regional Director Northern Europe and was based in Germany. He had worked with the company for two years and had a business degree and an MBA from the states. He had worked for a number of blue chip companies. His regional area covered Germany, Switzerland, Austria, Denmark, Norway, Sweden, Finland, Estonia and a bit of Russia. He had responsibility for regional operations, key account management, sales and marketing.

Int6.3 was the Marketing Manager on the Global Accounts Support Team and he was based in Leeds. He had worked for the company for nearly two years and his background was largely in marketing with a leading retailer and then a building society. His main responsibility was partly marketing analysis but also the promotional aspects of marketing that related to the global accounts. For example, bespoke catalogues and CDRoms. He also saw his role as promoting the global accounts and global agreements internally.

For GAM7

Int7.2 was VP Globals for the company in the USA. His relationship with the Global Accounts Director was rather confusing, but basically he had responsibility for all the large national and international accounts that were run from the USA. There were roughly 37 of these accounts at the time of the interviews. He also acted *as a backstop* for the two US-based GAMs. Although they didn't report into him, they did have a dotted line relationship. He described it as *a kind of matrix system*.

For GAM8

Int8.2 was a Global Supplier Account Manager based in Leeds. She had worked for the company for two years and held a professional purchasing qualification. She

reported into the Director for Global Operations. She described that her job was very like that of the GAMs, except that she was managing global suppliers rather than customers. Her job meant that she worked very closely with all the GAMs on their global accounts.

Having looked at the background to the global account management programme for Case Study 3, and at the respondent profiles, the role constructs for global account managers, as they emerged from the data analysis, are now discussed.

7.4 COMPONENTSCO ROLE CONSTRUCTS

The ComponentsCo role constructs as they emerged from the data are now presented and discussed. See paragraph 5.4 of the CourierCo case study for a description of how the role constructs were analysed. As is consistent with a literal replication study, the data from this third case study were analysed against the same top level codes as the first and second case studies (see Paragraph 4.4). The ComponentsCo role constructs are shown in Table 7.1. As with the previous two case studies, these are presented in order of by text unit count.

Table 7.1 ComponentsCo Role Constructs: Count By Text Unit

Role Construct	Text Unit Count	Respondent Group			
		Org	GAM	Cust	Int
Goal Focused	19	√	√	√	√
Financial	9	√	√	√	√
Personal	5		√		
Non-Financial	5	√	√		
Customer Focused	90	√	√	√	√
Understanding the Customer	23	√	√	√	√
Facilitating the Contract	21	√	√	√	
Building Strategic Relationships	15	√	√	√	√
Developing New Ideas and Opportunities	15	√	√	√	√
Focal Point of Contact	10		√	√	√
Exchange of Best Practice	6		√		√
Internal Focused	67	√	√	√	√
Managing Internal Team	27	√	√	√	√
<i>Internal Team: Managing Team</i>	<i>14</i>	√	√	√	√
<i>Internal Team: Managing Virtual Team</i>	<i>5</i>		√		√
<i>Internal Team: Motivating Team</i>	<i>4</i>		√		√
<i>Internal Team: Different Teams</i>	<i>4</i>		√		√
Facilitating Contract	10	√	√	√	√

Customer Advocate	7		√	√	
Knowing Own Organisation	6		√	√	√
Managing Political Environment	5	√	√		√
Providing Support	5				√
Exchange Best Practice Internally	4	√	√		
Finding Opportunities	2				√
Internal Consultant	1				√
Account Planning Focused	14	√	√		√
Account Planning	10	√	√		√
Making Business Cases	4	√		√	
Spanning Focused	60	√	√	√	√
Managing Communication	33	√	√	√	√
Managing Culture	27	√	√	√	√
Total	248				

7.4.1 Goal-Focused Role Constructs

As with the previous two case studies, the goal-focused role constructs emerged mainly from the Organisation and GAM interviews, although in this case study two of the internal team members also mentioned the financial goals of the GAMs. Again the GAMs mentioned personal goals that they wanted to achieve that were not linked to organisation's objectives and reward systems.

The issue of taking a long-term perspective emerged again this time from one of the customer respondents who pointed out the dangers of having short-term goals and allowing short-term goals to drive the business.

'Maybe looking at it in terms of a more long-term perspective. I think there's a danger sometimes where you look at a sales environment that's always been budget led, there's monthly targets or quarterly targets and everything's driven by either profit generation or sales generation, and it tends to be quite a short term approach. But when you're talking about a global account things are not as immediate, things take longer to build. So I think the key thing there, is for them to have the long- term vision and to accept it'. Cust6.1

Financial Goals

This was a key focus for the GAMs as the whole GAM programme had been started to grow the existing customers and to consolidate the bigger customers' business.

'We will be setting the budgets globally. Although the GAM doesn't have P&L responsibility at the moment as our systems aren't ready to cope with that, they do have targets and a responsibility to grow the business. As we see growth with the customer, so the customer specific team led by the GAM is likely to grow.' Org3

All three GAMs had goals focused on achieving financial targets.

'I sort of have responsibility for profit and loss. What I mean is, I do have but the information can be very difficult to collate.....You must have a good understanding of the financial side of things, from P&Ls etc. because when you're talking to your customer and you're talking internally you need to be able to talk on a level.' GAM6

'We have financial goals that go across the business.' GAM7

GAM8 said the GAMs really needed to treat the customer account as if they owned that part of the business.

'Absolutely I have total financial responsibility for these accounts. We have to report regularly on how we are doing against our target goals.We own this account as far as how it's running and we need to be involved in every aspect of it, as if it's our own business '. GAM8

The internal team members also saw that the responsibility for growing the volume of the business was seen to be the GAMs. Increasingly, the GAM was seen as having the responsibility for managing profitability as well. However, they did articulate a role for themselves as well, in helping the GAM to achieve the financial targets.

'Obviously they've got targets for financial targets. We measure certain types of activities as well, not just financial sales results, we do look at margin or profit. Profitability of the customer is important. So, you know, it's one thing to increase sales and to grow on the top line but we also look at the profitability of the customer.' Int7.2

'They have the responsibility to go out and grow the business. We have the responsibility to back them up with the best service possible.'

Int8.2

Non-Financial Goals

While the financial goals were very important, the GAMs also had a number of key performance indicators (KPIs) that were of a non-financial nature. For example, one of the KPIs was to build up an in-depth knowledge and understanding of the customer. The reason for this KPI was that it had been recognised that as the global accounts had only been there for a year, that there was still a lot to learn about the global customers. Some of the KPIs were related to specific customer projects, such as delivering a bespoke customer catalogue (a joint target with the Marketing Manager) and one was about doing the global account plan.

Personal Goals

The GAMs in this case study also had their own personal goals that they wanted to achieve.

'Personally, I would like to get the account team on a better footing. What I mean is that I would like it to be a more closely-knit team so that it was more effective than it is now'. GAM6

'What I want to achieve is having facilitated the relationship we have in the US in all the regions. I think that's a tall order'. GAM7

'Yes. To get my colleagues here in the US to realise there is a world out there with customers in it. I'm serious. They don't think beyond the States'. GAM8

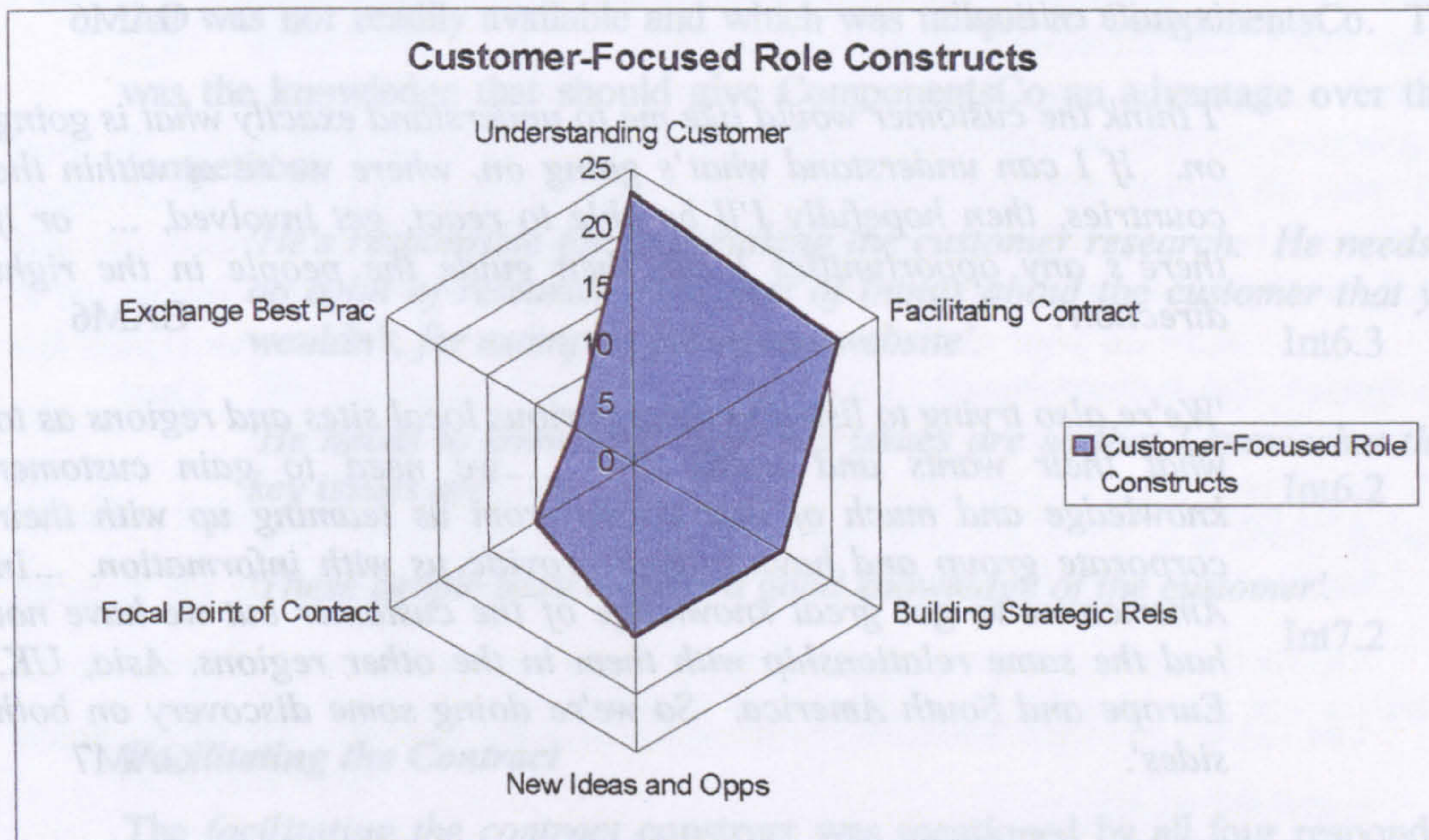
7.4.2 Customer-Focused Role Constructs

Having looked at the goal-focused role constructs that emerged from the ComponentsCo data, the customer-focused role constructs are explored. The chart in Figure 7.4 represents the text unit count for each customer-focused construct.

In this case study there were four customer-focused role constructs that stood out from the rest. These were, in order of magnitude, *understanding the customer*, *facilitating the contract*, and then *building strategic relationships* and *developing new ideas and opportunities* which both had the same number of text units. The interesting construct for this case study is *facilitating the contract*. This did not

feature as such an important construct in the other two case studies. This particular point is discussed in more detail in paragraph 7.5.1.

Figure 7.4 Customer-Focused Role Constructs by Text Unit Count



Understanding the Customer

Like CourierCo, the *understanding the customer* role construct was the most mentioned in the ComponentsCo study. All of the sub-themes shown in Figure 6.6 were also evident in this case study.

Understanding the customer was an area which was recognised as an important part of the role, especially given the fact that the organisation had only been focusing on the global customers for a year.

'We have only been focusing on the global customers for a year, so I guess there's a lot we still don't know about the customers. The GAMs have been tasked with, it's one of their KPIs, to build up a picture of the customer, you know, not just information but stuff we can really use to help us manage the customers more effectively.' Org3

All of the GAMs expressed this as an important part of their role. In particular, *understanding the customer's strategy* and getting the knowledge of the customer across the globe and not just in certain geographical areas.

'I think you've got to have an understanding of what the customer is trying to achieve. There is obviously the basics of where they are and who they are, etc. but knowing what they're actually trying to achieve is quite critical.'
GAM6

'I think the customer would like me to understand exactly what is going on. If I can understand what's going on, where we're at within the countries, then hopefully I'll be able to react, get involved, ... or if there's any opportunities I can then guide the people in the right direction.'
GAM6

'We're also trying to listen to these various local sites and regions as to what their wants and needs arewe need to gain customer knowledge and much of that comes from us teaming up with their corporate group and having them provide us with information. ...In America we've got great knowledge of the customer but we have not had the same relationship with them in the other regions, Asia, UK, Europe and South America. So we're doing some discovery on both sides.'
GAM7

'The biggest thing is to know the customer and divisionally what their initiatives are, and what their expectations are...always trying to be in the leading edge there.You need a great knowledge of their company.'
GAM8

One customer respondent made the point again about the GAM almost needing to *understand the customer better than they do* themselves.

'I guess I would want him to know almost as much as I do about, and maybe even more, about [our company]. How we're structured, where we are. I'd want him to know where we're building new factories.'
Cust 6.1

Understanding the supply chain was another sub-theme that was mentioned by the same customer.

'Business knowledge is important. I think the key things if you look at it from a global perspective is knowledge of supply markets.'
Cust6.1

There was also an issue about the quality of the information. One of the team member respondents talked about how easy it was to get a lot of information about a customer from readily available sources such as the internet or company reports and media cuttings. But he saw that where the GAM really

needed to be focused, was on getting information about the customer that wasn't readily available. This added other dimensions or sub-themes to this construct. This was that knowledge of the customer could be either *readily available* or *not readily available* and it could be *common* or *unique*. Where the GAM needed to focus was on the customer knowledge and understanding that was not readily available and which was unique to ComponentsCo. This was the knowledge that should give ComponentsCo an advantage over their competitors.

'He's responsible for undertaking the customer research. He needs to do a lot of research. The sort of things about the customer that you wouldn't, for example, get on any website' Int6.3

'He needs to know what their key issues are so that I know what their key issues are' Int6.2

'These people have to have a good knowledge of the customer' Int7.2

Facilitating the Contract

The *facilitating the contract* construct was mentioned by all four respondent groups. This was an important construct in the ComponentsCo case study in terms of text unit count against the previous two case studies for this item. The comments from this case study also indicated some sub-themes to the main construct:

- Strategic negotiation of the contract
- Rolling out of the contract
 - Hard Issues: operation, service delivery etc
 - Soft Issues: people on board, building trust etc
- Marketing of the contract

Carrying out this role was seen as a major challenge for the GAMs by the Organisation respondents.

'Even though you have these global agreements you still have to sell the agreement at the street level day to day. I can make all the agreements in the world if you like, but if nobody tells the troops that we're fighting a war then we have a problem and the contract will die. It is the job of the GAM to make sure they are keeping all these people

engaged on the contract. This is in terms of the customer's organisation as well as our own'. Org3

'If you like, both the selling company and the buying company are both trying to deploy the agreement albeit from their own point of view. They've got this great deal out of us and we've been able to get this deal out of them and you've got to follow it up. What has been missing is the collaborative approach to managing the agreement and that's where the GAM now comes in'. Org3

'When we sign these global agreements it's a bit late telling the local people after the event that you're now married and it was an arranged marriage by someone else. They might be having a relationship with someone else and all of a sudden they're now told, no, you've got to have all your business with this person here because we've signed this global agreement. It takes a lot of careful handling'. Org4

This had already been a major part of the GAMs roles as the global contracts were all relatively new. Therefore the focus had been on pulling the contract together with the customer and doing the main negotiations at a strategic level. The GAMs had then needed to focus on the process of rolling out the contracts round the world.

'Well to start with it was the negotiation, putting the contract together, The negotiation probably went on for about a year, as it involves various people.we could probably do with a little bit more time but the time now needs to be spent with each individual country. Centrally you know we've achieved what we can achieve at the moment and we now need to get out there and launch the agreement. What needs to happen now is that we actually get out there, you know we talk to these guys on the ground and start to understand what their needs are, and that is happening now on a daily basis'. GAM6

'Since this is a new global contractual arrangement, what we are doing now is trying to gain compliance with all of the local plants so to speak.[The customer] can be very silo driven so our main thrust is rolling out the contractual agreement'. GAM7

'For me, [the biggest challenge is] being able to facilitate the contract round other divisions, other areas of the company'. GAM8

The customers also expressed that they now needed to make the contract live. Cust6.1 felt the focus needed to now move away from the negotiation phase and onto the softer issues.

'We do have a truly global deal.I mean we've done the negotiation, all the commercial terms and conditions have been set. So

what I'm really looking for is for the supplier, [ComponentsCo] and especially GAM6, I mean its now far more that the soft, touchy, feely things. I mean they must be proactive, they must be responsive to our needs, I think the key thing, well we need to make the contract live'

Cust6.1

'I want him to co-ordinate the deployment and rollout of the agreement. I want him to try and also co-ordinate the marketing of the agreement. I don't know what you've found so far [with other companies] but the governance model of [our company] is that we don't currently mandate agreements. That may vary from company to company. But our view is that the deal must stand on its own. You know, on two feet. It must stack up for each business and therefore a role in the marketing of the benefits in the agreement is key'.Cust 6.1

'She is the global account manager. She is tasked with taking our agreement and giving it life. She has to work with my counterparts in Europe and Asia to get the agreement up and running over there. She and I, we'll try to attack them from both sides. I'll, you know, go with that market internally and she'll go externally'.

Cust7.1

Finally, the internal team members in this case saw this role as a key aspect of the GAM's job.

'You know, really her relationship is at a much higher level but she just does try to leverage the contract from corporate with the local people'.

Int7.2

'We can provide all the back up for the contract but they're the ones who have got to be out there promoting it'.

Int8.2

Building Strategic Relationships

A number of the sub-themes for the *building strategic relationships* construct that emerged in the previous two case studies again were evident in this case study. For example, there was a recognition that while this was a GAM role, it was also one which needed a long-term perspective as it took time to build the right kind of relationship. However, the Organisation respondent felt that the effort involved in building the *long-term* strategic relationship was paying off.

'With [EngineeringCo] we are beginning to get a very good relationship. [GAM6] has put a lot of effort in over the last year in building this key relationship. The customer is now prepared to do joint meetings and visits with his team, go on tours with us etc. They have also given our Board and my team a presentation about what they

are planning to do and how they would like to work with us into the future'. Org3

Because the global relationships were still fairly new all the GAMs saw building the relationship as an activity they had to engage in.

'Then with the customer, my main job is toprimarily I liase with people like their global business manager and the central purchasing manager. So I will liase with those individuals to build the relationship'. GAM6

'Being able to facilitate the relationship between the two companies in a global fashion'.

GAM7

GAM8 also saw the advantage in building the relationships first at the most strategic level possible and then work down the organisation. She felt this was much the easier way to work than vice versa.

'We have a major meeting every so often with the customer team and once a year at very senior levelVP level or a director. It is a global meeting where you have a team of people from each division or region.In terms of building a good relationship, in our situation as a global manager it's best to be in at the top and then work down than trying to go from the bottom up'. GAM8

Building relationships at the strategic level was also mentioned by the internal team members who supported the comments made by internal team members in the previous cases.

'When [GAM7] goes to Phoenix and visits [the customer] she doesn't make sales calls to engineers at [the customer] with the local [ComponentsCo] sales people. I mean her job, she goes in and meets with the procurement people at the highest levels so that she can to build [our] relationship with [the customer]'. Int7.2

'They have to get to a point where they can start working with someone strategically really so that they can move the relationship forward'. Int8.2

Developing New Ideas and Opportunities

The fourth construct in the ComponentsCo study is the *developing new ideas and opportunities*. It was seen as important by GAM6 that the development of opportunities should not be about simply reinventing the wheel when looking

for opportunities but to use the existing capabilities of the organisation in new ways as well.

'We are looking for projects that we can roll out across the world. For example, one of them at the moment I'm looking at is on vendor managed inventory and we're working together and looking at ways that [we] and [the customer] can actually work in partnership. So, what we're actually looking to do, is to come up with some form of a solution for [the customer] where [ComponentsCo] can provide a vendor managed inventory solution to individual countries and sites. So my job is to, to take a step back from [ComponentsCo] and to look at what we've got across the group, then offer that to [the customer] and work with them.' GAM6

'You need to look across all the companies and think outside the box..... try to think what I can do to make their job easier.' GAM6

'We need to know what's going on throughout the globe and identify the initiatives and new projects. We also need to look at things that are projected for the following year, you know, if we have an e-commerce solution that would help them.' GAM8

Cust6.1 actively encourage suppliers to bring him new ideas and concepts and thought ComponentsCo were good at this.

'I am open to new ideas. I like suppliers who put effort in here. [ComponentsCo] tends to be good at this.' Cust6.1

'We have a lot of conversations surrounding the new e-commerce opportunities. This could be big for us. [GAM7] knows a lot about this.' Cust7.1

'She has to be creative. I mean, she has to keep looking at things differently.' Cust8.1

Two of the internal respondents described this aspect of the GAM's role as one which differentiated a GAM type role from a sales type role.

'The ability to think outside the box. In other words, you know, we've moved well beyond the transactional sell. You know we no longer sell parts for prices, we now sell solutions to the customers needs. And you know we're moving, I think, towards more of a visionary approach where we're trying to find out where the customer is going and figuring out how we can help them get there faster, which is, I think a much different mindset for the GAMs.' Int7.2

'She discusses with the customer some of the new programmes that we've come up with and she tries to identify opportunities locally.So they're thinking about new programmes and how they fit into the customer and how to execute them properly.' Int7.2

'What seems to differentiate these roles from sales people is the need to be partly a project manager, but also being innovative and being able to think strategically. It's very like my own role with the suppliers.' Int8.2

Focal Point of Contact

Like ComputerCo, the different respondent groups were clear about the role of the GAM in respect of needing to be the *focal point of contact* for the customer. Two of the GAMs saw this as a requirement that the customer wanted to have.

'And to get from our point of view - to have the one central contact for the customer.' GAM6

'Whenever I go to see the customer, the first thing that comes out of their mouth is - 'Are you the person to deal with? We want one contact, we want to make sure of that. We don't want to have to tell 15 different people'. They want to make sure they have just one, you know, contact and they want to make sure that contact is very knowledgeable about the customer.' GAM8

Cust6.1 expressed quite strongly that this was his expectation of GAM6, as did Cust 7.1 and Cust8.1 of their respective GAMs.

'It is important that GAM6 co-ordinates all the various country activities and acts if you like as the single point of contact for us. Yes. So that if we want to know what's happening in the Czech Republic with [ComponentsCo], I want one person to go to who would co-ordinate all of that for me. I don't expect [GAM6] to know everything but I do expect him to be able to co-ordinate everything for me. What I don't want to do is to have to make 20 different phone calls around the world when I want one person to co-ordinate all that for me.'

Cust6.1

'Well she's a key point of contact person. We're very interested in having one point of contact really that we deal with and if I have any issue I call her with it. She finds the right person within her company to deal with it.' Cust7.1

'Everybody was going to all different people with the old structure. You know, no one person would understand the enormity of it. Now we have one person to go to.' Cust8.1

Internal team members also thought that this was another role where the GAM could add value in the customer relationship.

'They need to be the main point of contact for the customer which is why they need to be located, you know, put them where the headquarters would be.' Int6.2

'Where [GAM6] really adds value is in being the single point of contact.' Int6.3

Exchange of Best Practice

The final customer-focused role construct in this case study is about the *exchange of best practice*. As well as developing new ideas and opportunities, it was also important to exchange learning. The customers were certainly looking for this.

'I look to him to sort of bring some sort of learning across and innovation as well.' Cust6.1

'As I say we have a global organisation, 185 factories, its impossible for me to know everything that's going on in the world and maybe sometimes the people, like the GAM within [ComponentsCo] are a useful source of information for me. And therefore they can highlight possible new opportunities in certain factories. So for me they're also a source of good knowledge.' Cust6.1

'She has to try to find out what is happening elsewhere that may be good for us.' Cust8.1

The GAMs also mentioned that the customers had an expectation that good practices would be rolled out to other parts of their organisation. They also saw it as their responsibility to recognise if something was working well in one location that it could be something that could also work well in another location.

'I think the customer is looking for support and co-ordination of all their activities and for evolving the best practices that we've learned here in the US to the other regions.' GAM7

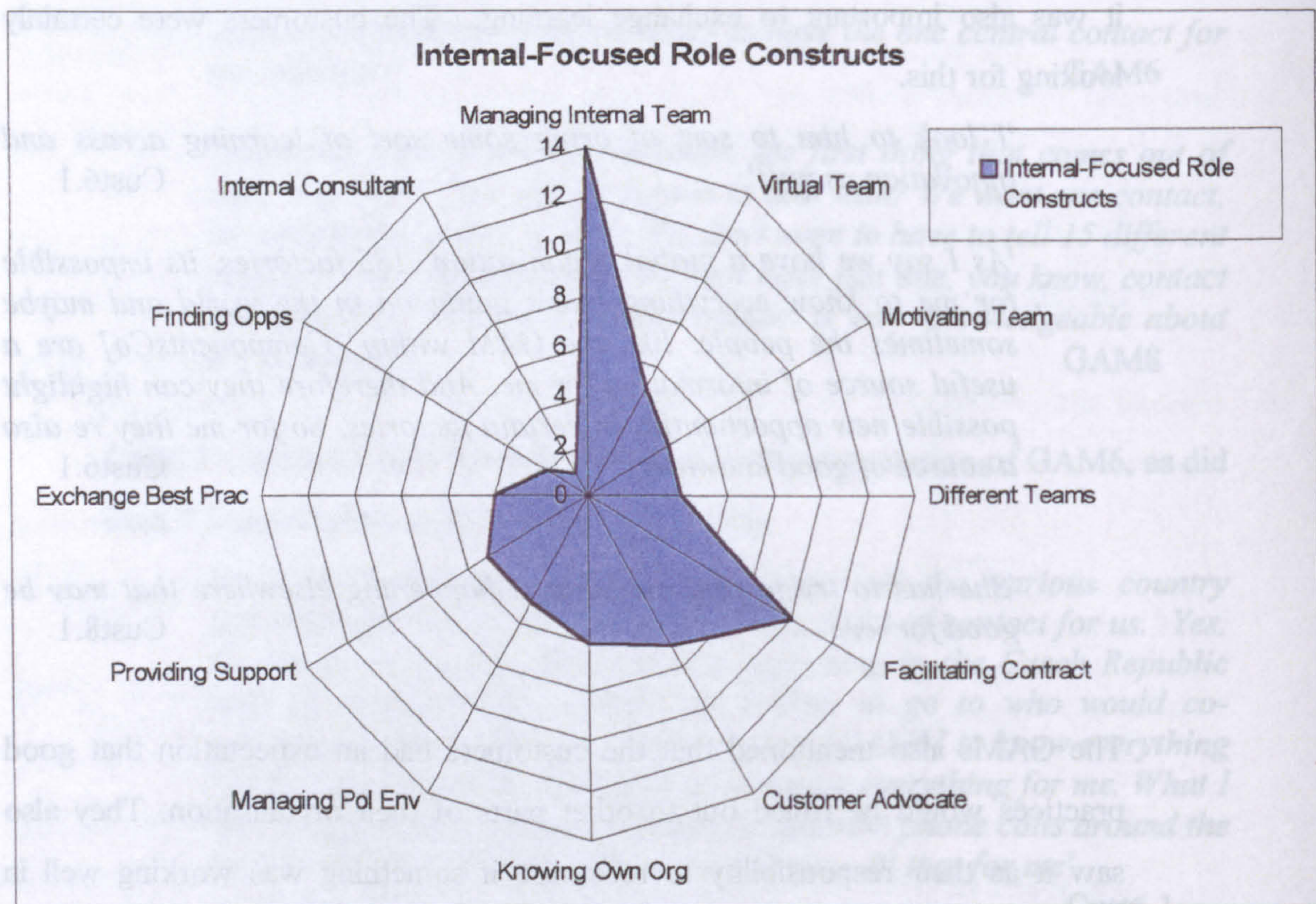
'You also have to know what's going on locally so that if something's working in one facility and you know it's a benefit to that facility, a lot

of times what we do as global account managers is to see if we can use it for another division'. GAM8

7.4.3 Internal-Focused Role Constructs

Having presented the customer-focused role constructs that emerged from the analysis of the ComponentsCo interviews, the internal-focused role constructs are now explored. Figure 7.5 represents the text unit count for the internal-focused role constructs.

Figure 7.5 Internal-Focused Role Constructs by Text Unit



Managing the Internal Team

As with the previous two case studies, the *managing the internal team* construct had the highest text counts of the internal-focused role constructs.

None of the GAMs had any team members reporting directly to them so, as

with CourierCo, much of their role was about bringing together account teams where all the team members reported to regional or functional managers. The four sub-themes identified so far in the previous two cases, all featured again in the ComponentsCo data. The sub-themes are:

- *Managing the virtual team*
- *Motivating the team*
- *Managing different types of team*
- *Developing the team*

Managing different types of team was a theme that ran through a number of the comments made by the respondents. Another dimension to this was that these different teams could either be ongoing *permanent* teams such as the sales and account team for the global account around the world. Conversely, the teams could be *temporary* if for example there was a team based around a specific customer project. The team would exist for the project and then it would disband once the project was completed. GAMs needed to be adept at managing and leading both types of team.

The team leadership was described by the organisation respondents in terms of leading a *deployment team*.

'The GAM has to be the leader of what I would call the 'deployment team'. Finding the right people in our organisation to who will be part of this deployment team is very much the role of the GAM'. Org3

'Keeping everyone together and on track needs to come naturally to them.And to influence them because some of those don't want to be in your virtual team or they've other virtual priorities, absolutely'. Org4

Org4 actually described it as being like a marriage guidance counsellor.

'It's a bit like working for Relate, you know, like a marriage guidance counsellor'. Org4

Org3 also described a situation in the future where the GAMs might have a dedicated customer specific team with the GAM taking on the role of being an *MD for the customer*.

'It is all about thinking globally. I would like to see eventually a customer specific response team for the big global customers which the GAM would lead, if you see what I mean. He would be, you know, in that type of role almost like an MD or CEO for the customer'. Org3

The GAM respondents mentioned *managing the internal team* both in terms of leading a team but also in terms of displaying *leadership* in the organisation. They also talked about managing *cross-functional* teams and also *virtual* teams.

*'When we decided there was going to be a global accounts team, my job was to basically - the first thing was to pull together the team and try and understand what was going on, and to work with [my boss]'.
GAM6*

*'You need take control of your own company which is quite difficult. You need to be able to display leadership back in your own company'.
GAM6*

'I see my job as co-ordination of the internal corporate personnel in our various departments; e-commerce, contract administration, operations, and our logistics manager. I've made some pretty dramatic changes with this new contract so I've been involved with the team quite a bit.We've got quite a big virtual team'. GAM7

*'You have to have leadership skills and provide leadership and know how you want to do this or that'.
GAM8*

The customer respondents again articulated a role for the GAM in terms of leading the internal team. Their expectation was that the GAM needed to co-ordinate and lead the team and that it was their responsibility to ensure all members of the team understood the customer's objectives.

*'I've met all the team, well the key people. It comes back to this co-ordination thing. I expect all the members of the team to know what the objectives are for [us], what we want to achieve etc. [GAM6] needs to lead from the front, which given his background, well, you know, he must be able to'.
Cust6.1*

'I see her as very much the person who has to line up all her people internally, you know, get all the ducks in a row. They have to know what we're doing and what they're doing. This has been better since the global agreement....She has put a lot of effort in here'.Cust8.1

None of the GAMs in this case had anyone reporting directly to them so all members of the teams were part of a *virtual team*.

'He needs to make sure that the country organisation supports him. There will be a country key account manager and he needs to make sure he has the perfect relations with this guy and others and motivates them all. This guy has a straight line to me and a dotted line to [GAM6]. There is roughly another 40 sales people involved in this account worldwide.I am on the same sort of level as him but he needs me to be on the team and on his case as well'. Int6.2

'This guy has to get the other functions working for him as well, like operations and logistics and supplier management.he needs to motivate, initiate, inspire'. Int6.2

'We have to be a team. The GAM needs to trust me as the marketer and I need to trust the GAM to deliver on certain things. He needs to set the agenda and well, on the whole it works pretty well'. Int6.3

'Meeting the team is very important. We've brought the teams together. The GAM needs to be good at team building, you know, with people who do not work for them'. Int7.2

'We, in our role of global supplier management, are a critical part of the teams that deliver for the global customers. We work with all the GAMs.' Int8.2

GAM7 thought that building and *developing the internal team* was important.

'You know, I think building and developing the internal team is important as well and we're starting to get there. We're strategising a bit more and we're now starting to feel friendships'. GAM7

Finally, GAM6 saw his role as extending beyond just team leadership.

'This is why I believe its quite important that I should manage the company to manage the customer'.

Facilitating the Contract

As well as having a role to facilitate the contract externally with the customers in the customer organisation, the four respondent groups in the ComponentsCo case study also suggested the GAMs had a role internally to do the same.

'We have talked about the need for the GAMs to really get the customer's people on board with the contract. It is just as important in our own company. You know, people at local level want to do their

own thing locally, and the Regional Managers need to be convinced about the global contract'. Org4

'As I've already said with the contract, as well as, you know, co-ordinating it from [our] perspective there is a lot of work for [GAM6] in getting his organisation on board. He needs to co-ordinate and roll out the agreement in [ComponentsCo] down to local level'. Cust6.1

'As I said just now, I need to manage the company to manage the customer. I have spent a lot of time with our KAMs at local level making sure they know what is happening with the global contract. A lot of the Regional Managers were dead against itthey saw it as somehow taking their power away.....they took a lot of convincing and I'm not sure they are all convinced now'. GAM6

'I have a big job to do to get the guys in the front line to buy into this global agreement. I almost need to sell it harder internally than I do with the customer'. GAM8

'There is a job for the GAM...well I suppose he has to do a bit of internal marketing of the contract to the people who should be using it. In my job, I also need to know exactly what the contract is about otherwise I can't provide the service that the customer expects'.

Int8.2

Customer Advocate

Like ComputerCo both the GAMs and the customers thought the GAM should have a role as *customer advocate* back in their own organisation. Two of the customers described this role.

'There is a very big job for [GAM6] in educating others in [ComponentsCo] in terms of what we are expecting from the global relationship and contract. He needs to almost put himself in our shoes and tell it from our point of view'. Cust6.1

'I kind of also see her as the liaison, to act as a lobbyist on our behalf, you know, to work for our interests, do work for us'. Cust7.1

GAM6 had a clear steer from the customer that this was his expectation.

'The customer [Cust6.1] has said that he expects me to represent his views and his requirements back to the senior people in my company'. GAM6

Knowing Own Organisation

Only the organisation respondents did not express *knowing the organisation* as a role for the GAM. The internal team members thought the GAM not only needed a deep understanding of their own organisation but also of the

differences between the different parts of the organisation. This was particularly the case between the acquired parts of the organisation.

'He needs a deep understanding of our own organisation'. Int6.3

'They need to understand how the [US-based] business works and now we are in a global situation they need to know how the [UK-based] business works because the two companies do operate differently'.

Int7.2

The customers also wanted the GAMs to understand their own company's capabilities in each of the countries they operated in.

'I'd want him to look at the trends and in terms of [his] business I would expect him to know the capabilities in each country, of what they can and what they can't do. Because it's important also that, because it's a global agreement, we know that their service capabilities are the same in each country'.

Cust6.1

Knowing the company's capabilities was also seen as an important part of the job by the GAMs.

'You really do need to understand your own organisation and find out what the limitations are but also what are the strengths. I mean we bought a wholesale business recently, just in the UK and on the surface people would say, well, what use is that to a global account. But they've actually been working vendor managed inventory for 2½ years and they've got a good system in place.'

GAM6

'You also need a great knowledge of you own company and what your capabilities are'.

GAM8

Managing the Political Environment

Managing the political environment was mentioned by Org4 who also talked about diplomacy being important.

'Diplomacy is called for on a regular basis.And the politics that are attached to it, to be brutally honest with you, is a major challenge for the account managers'.

Org4

GAM6 felt that understanding the internal political environment was an issue for him that he had to make sense of if he was to be effective.

SH *'Right so you've got to be quite sort of politically astute in that sense?'*

GAM6 *'And then you've got, you're checking your own company's politics and problems, strengths and weaknesses and you've got to try and sit down and make sense of it all'.*

Like Org4, GAM6 also saw the role as being like a diplomat.

' To be a good diplomat, a politician I think as well. I know within [ComponentsCo] the role of global account is perceived to be a senior one and I deal with the general managers around the world who are in senior positions in our company. If I say, I think we should be doing it this way, you've got to be very careful, because then you've also got to be going out to their departments and borrowing resource, because you need them to effectively form your virtual team. So I think diplomacy and the ability to negotiate internally is critical'.

GAM6

Being politically aware was also seen as important by the internal team respondents.

'I mean the term 'politically' is often used sort of as a bit negative, but you need to have some feeling for people. You have to know when not be aggressive or when not to be too soft. You have to know where you might find a blockage internally'.

Int6.2

Providing Support

As with the previous two case studies, only the internal team members saw *providing support* as a GAM role construct.

'Sometimes it's a, you know, mutual support. He needs my help and I need his'.

Int6.2

'He will have a target that is in sync with my targets, so we agree between us what support we will need from him to achieve them.then its defined what we need to do for the whole organisation. So, it's not just his plan but it's mine as well'.

Int6.2

'Because, you know, sometimes we need a bit of hand holding if you don't know much about the account. Each job I do is very specific to an account so I do need his help'.

Int6.3

'Just back up really. You know, if you are doing something, if you are trying to drive something forward and the GAM thinks it's a good idea then they need to say that in the right places and back it up - the idea. And if you've innovated something that the GAM used, that they then make it known to other people. With the global accounts we are innovating a lot of stuff the company hasn't done before so, you know,

just backing it up when the time comes. And I need to do the same for him'.

Int6.3

Exchange of Best Practice Internally

As well as knowing their own organisation and its capabilities, GAMs were also then in a position to facilitate the *exchange of best practice* and learning.

Org4 'On the positive side, if it's managed well, if something works well in North America they are in a position, well to transfer that across to Europe or transfer that across to Asia. It's an opportunity to highlight, if you like, global opportunities or synergies that we can achieve across the regions, and that's when it would go into the global box rather than the regional'.

SH 'That's interesting. So, you're seeing the role as a way to transfer learning and best practice'.

Org4 'Yes, that is what everyone talks about, you know, looking for best practice and sharing it. It's very difficult to do in practice though'.

GAM6 and GAM 8 both thought that if you really understood your own organisation and its capabilities then you could also migrate best practice internally and leverage it in terms of customer solutions.

'If you can identify the internal strengths and instead of reinventing the wheel which is what a lot of companies do, you try and look for something new. We can use our strengths and try and spread the word. I think if you can identify that, then when you talk to the customer, if you know what the customer wants you can try and match those two together and things will move a lot quicker than trying to formulate a plan and come up with a new solution for the customer. Try and use the resources that are already there because you know, if your company, even if its bought into global accounts, you know there's a good chance you probably haven't got many resources at your fingertips. So, you're going to have then borrow and steal and if you can do it well you can react to things a lot quicker'.

GAM6

'And I think that sharing best practices and knowing best practices outside the [customer]'s industry and bringing those in are very important. You know, I don't handle a Siemens or a Honeywell, but my peers do and I may be able to spread their solutions to my global customer'.

GAM8

Finding Opportunities

The internal team members do have an expectation that the GAM's role is to look for opportunities that will help them.

'We need these people to come up with solutions type offerings for customers. We depend on the role to see needs that are emerging. Every global account manager needs to know what we can offer, what the customer is looking for'. Int6.2

'He needs to find the opportunities for us to use then we can go for them'. Int6.3

Being an Internal Consultant

Being an internal consultant was also mentioned. GAM7 said that she was much better confining her role to that of a *'business consultant and coordinator'*. She said that she *'gives them [the internal team] the tools and they go and build the local relationship'*.

7.4.4 Account Planning Role Constructs

Having looked at the internal-focused role constructs, the account planning role constructs are now explored.

Account Planning

Producing a customer account plan was seen as part of the GAM's job but one which was likely to get more significant in the future as the information on which the plan would be based improved. The company was investing in a Siebel system which would eventually allow access to customer information from anywhere in the world.

At the time of the interviews, the GAMs were very dependent on whatever information the market and business analyst in the support team could provide plus their own intelligence gathering. There was a plan format which they had to adhere to so that there was some *'coherence and transparency'* [Org3].

Either the GAMs were in the process of building account plans or already had them in place.

'Yes, I do have a plan. It's about ten pages long.What I'm trying to do is look at the long term. You've got to be looking at this as 3,4,5 or even 7 years ahead and not try to get everything up and running next week'. GAM6

'I will involve the customer in the account plan, but I do not have a formalised plan written down yet. That will come in the next 60 or 90 days'.

GAM7

'I absolutely have an account plan for [the customer]. And the customer usually sees it because we sit down and discuss it with them. We put a business plan together and basically that business plan shows, you know, what the expectations are, how we plan to give our solutions and what we can offer the customer as far as manpower, electronic solutions and who is on the team'.

GAM8

'We look at the plan for longer than a year. Any long-term solution we want to invest in, we want to make sure it's a 3-5 year project'.

GAM8

Making Business Cases

This role was only mentioned by the Organisation respondent and the customer. The GAMs did not mention this role.

'Certainly he has to be able to understand, you know, at least basic financials and I would say, I'm certainly not an accountant, but I guess its not just about sales, its about you know looking at the financial opportunity and assessing whether, you know that the payback that he's going to get, that we're going to get. It's just basic business skills as opposed to any financial skills.

Cust6.1

'If they identify a project with the customer and that is going to need say, some specific investment.....then they will have to present me and perhaps the Board if it is significant with a good case for doing it. This is the sort of thing that they have not had to do as KAMs'.

Org3

7.4.5 Spanning-Focused Role Constructs: Customer and Internal Focus

The spanning role constructs and their sub-themes are explained in paragraph 5.4.5 and in Figure 5.7. These constructs are now discussed in relation to the ComponentsCo data.

Managing communication

The *managing communication* construct, as with the previous two case studies, was seen by all the respondents as a key construct in terms of the GAM role. Org4 thought that the ability of the GAMs to *continually*

communicate was very important, while Int6.2 stressed that this was something the GAM needed to do well.

'Like anything, they need to continually communicate what they are doing, especially as our business is changing a lot with the new acquisitions but also the customers change a lot too. We are getting more market driven and more customer focused and the GAMs are at the forefront of that for the global customers.' Org4

'This role has no direct powers, so he has to be smart and do communication extremely well.' Int6.2

The point was again made that the GAM not only needed to manage the *strategic communication*, but also the communication at all levels.

'So I'm sort of dealing at this central level, a sort of strategic level but I've also got contacts with the NAMs and KAMs and their contacts at country level.' GAM6

While no specific customer communications were mentioned, two of the GAMs mentioned aspects of their activity that were to do with managing customer communication.

'I have to be the communicator, negotiator, facilitator, administrator and loads more for the customer.' GAM8

'We are trying to promote the relationship with them so that they know about the global agreement and that the corporate group is trying to capture all the spend under one umbrella.' GAM7

This second comment highlighted two further sub-themes of the *managing communication* construct that emerged in this case study. These were *internal marketing* within ComponentsCo and *external marketing* within the customer's organisation. For example, all the GAMs described these aspects of marketing as a key part of the role in managing communications.

'The first task is not to market to the customer but to market internally. I need a campaign to get everybody to buy in to global accounts and to understand what we are trying to achieve with those accounts. That's my humble opinion.One of the things we are looking at is how to share the information internally.' GAM6

'You need to sell the concept of global account management to everybody. And that is from the telesales person in the office to the CEO. You have to get everybody within the business buying into

this. I think it's very important to communicate with all interested parties, particularly about what is expected of them'. GAM6

'I guess in this role you are doing internal marketing. They have to see that you bring something to the party'. GAM7

'Communication is everything. How we roll these things out to the local people. You have to have good sales skills internally to sell them the programme you have set up with the customer. Then you have to go and sell it to the customer'. GAM8

Closely linked to the points above, *internal marketing and managing strategic communication* were also felt by internal team members to be a function of the GAM.

'We have to have an interactive relationship. When you get to the level of global account management, I think all the marketing we do is very customised. You've got to make sure that every, every single thing is customised to that account. You can only do that of the GAM shares with you all that they know about the account and you share with them how you're going to do it. There has to be good communications and the GAM needs to be able to articulate clearly exactly what they need'. Int6.3

'She also tries to pass on information as to what's being done at [the customer] corporate. She acts as kind of the main communications link as well'. Int7.2

Cust6.1 also felt that there was a role for the GAM in being his *information manager* in co-ordinating not just the people but also the information.

'Obviously he's the trouble-shooter, you know, through that co-ordination activity. He collates all the information together. He produces reports for me which show, you know, anything that I want. If I want to know how much we're spending in Timbuktu on, you know whatever product, I don't expect him to produce a report then and there, but at least to find out the right person in the organisation that can do it and then supply it to me'.

Cust6.1

Nearly all the internal team members saw this *information manager* role as important, particularly in relation to the team members being able to do their own job properly.

'Basically, he has to make, you know, he has to make sure I know what's going on with the account, the one he's responsible for. What

their key issues are.....so that I see if I can do anything for it, for example any kind of marketing, marketing materials or any other kind of activity that goes with it to make sure we're fully up to date with what's going on'. Int6.3

'The one thing he is very good at is, you know, keeping us up to date, giving us the information along the way'. Int6.3

'I can't do my job as I want to do it without the right information. We touch an awful lot of departments internally and we need to have relationships with all these people all over the world. Someone has to co-ordinate it otherwise we would drown'. Int8.2

Communication was also need as one of the challenges for the account teams.

'The main thing we struggle with in this team is communication. The GAMs have got to communicate with marketing because it keeps the messages consistent and we never appear foolish. Communication is where we all fall down, over and over again'. Int6.3

GAM6 gave an example of where a communication had gone wrong internally causing some wrong information to go the customer which had ultimately required the CEO to step in to placate the customer.

' Now if we'd got the communication right in first place, what they asked us to do wasn't difficult, and we would have achieved what the customer wanted us to do and they would have been happy. But because of breakdowns in communications and things it can get blown out of all proportion, both from the customer side and from the supplier side, when people don't understand what's going on. I see myself as having to ensure there are better communications'. GAM6

Managing Different Cultures

Finally, in this case study, we explore the *managing different cultures* construct. The three sub-themes of *managing country culture, corporate culture* and *business culture*, represented in Figure 6.8, were again found throughout the ComponentsCo interviews. There were a total of 27 comments about managing the different types of culture, the highest so far of the case studies.

Once again, all four respondent groups saw cross-cultural management as a key issues for the GAMs. This was seen as a requirement of the GAM both externally and internally.

'You will have a meeting with the customer, the customer has over 200 production sites around the world. So, at the meeting you may have, on their team, as we had recently, people coming from China, Singapore, India, Mexico, two from the US and several from Europe. That was the customer. Then we had people on our side coming from some of the same countries and they've got to handle the different points of view.'

Org3

'People tend to kid themselves that the culture is the same but it's completely different. There is a much greater gap between America and Europe than anybody will ever admit to.'

Org3

Org4 also talked about managing the cultural differences between the various businesses that made up the overall organisation; *managing corporate culture.*

'There are still cultural differences within the businesses and within the countries, you know, how people behave here is different to how they behave in Asia or North America. That has to be taken into account as well.'

Org4

Again, all the GAMs illustrated how managing different cultures was a feature of their jobs.

'Yes, you're trying to balance the needs of the customer but then you've got the problems of slightly different cultural requirements, the different business requirements across the world. The demands the parent companies are putting on individual sites.'

GAM6

'Yes, I mean some of them, some of our guys have really bought into it, especially the Asian side of things but in Europe there's a big resistance to any involvement from head office and it's markedly different from when I get email daily from China and Hong Kong. But then from Germany we hear nothing, from France we hear nothing and from Spain we hear nothing... I think it's a cultural thing and I think a lot of suspicion as well of central control. I have to manage this situation.'

GAM6

'We've got two brands, two identities and at least two cultures and then you get into regional differences. Asia, even the UK and Europe, you know. I'm really learning the differences between your culture and ours. I had always thought we were far more closely related than we really were. The gap in the business language is huge. ...The cultural issues are huge.'

GAM7

'Key challenges on global are always cultural. There seems to be more cultural, language barriers - just the way of doing things in certain countries. I would say that's the biggest issue.You know in one country what somebody thinks is aggressive, another country wouldn't think is aggressive. So it's important to keep in the back of

you mind. Some of the cultural differences on entertaining and socialising are a big difference - you have to aware of all that'.

GAM8

The customers also saw this as an issue that the GAMs needed to aware of and manage.

'It's cultural awareness and that's not only cultural from a business point of view but also from a social perspective as well... if I look back at how I was 3 years before I even joined [my organisation], I had no real cultural awareness to be honest. I had some German experience but ask me where Shanghai was and I guess I knew roughly where it was but you know, I know much more now. And that's part of the challenge I think for global account managers, is to understand that not everyone works the same way as a Brit or a, you know even within Europe, you know I work for a Dutch company and their approach is even different to the UK approach'.

Cust6.1

'Getting people to open up and getting people to talk about what the real issues are and also being able to understand the different cultures. Maybe, you know, in a certain country, you can't ask certain questions or you can't do the things that you would normally do'.

Cust6.1

'The UK market is completely different to the market in the Czech Republic, completely different from the market in Mexico, completely different to the one in Poland. Your dealing so much more with corruption, it just works completely differently, so I think the global account managers got to, you know not to be an expert but has got to maybe understand or have some understanding of, for example, China, how does it work?'

Cust8.1

Finally, *managing culture* was seen by the internal team members as something the GAMs needed to contend with in their day to day jobs.

'These guys have to travel around, so their personalities, they have to be people who get along in different cultures.They have to be accepted'.

Int6.2

'So its kind of an awareness of you know, of cultural differences, the ability you know, to have the understanding and sensitivity of the cultural differences, and the political awareness, you know, of the countries that they would be operating in'.

Int7.2

'And there are enough cultural differences within the business communities'.

Int7.2

7.5 FURTHER ANALYSIS AND DISCUSSION OF CASE STUDY 3

The role constructs for ComponentsCo have now been presented and discussed and a few comparisons and contrasts have been made with the previous two case studies. However, as already expressed in paragraph 6.5, it is not intended to carry out a full cross-case analysis at this point between each of the individual cases as they are presented. As is usual when reporting a multiple case study, the main cross-case analysis takes place after the within-in case analyses have been presented (Yin 1994; Carson et al. 2001). This can be found in Chapter 9.

Throughout the reporting of the within-case analysis of this case study, a number of observations were made about the data and some further models and data displays have been presented particularly in relation to the sub-themes of the core role constructs.

In concluding this within-case study of ComponentsCo, some further observations on the data are now made.

7.5.1 An Analysis of the Role Constructs by Respondent Group

As with the previous case studies, there was sufficient data for the ComponentsCo respondents to produce an analysis of the customer-focused role, the internal-focused role and the spanning-focused role constructs by respondent group. The results of these are shown at Figures 7.7, 7.8 and 7.9 respectively. The numbers for the goal-focused and account planning-focused roles constructs are again too small to meaningfully represent them as a data display.

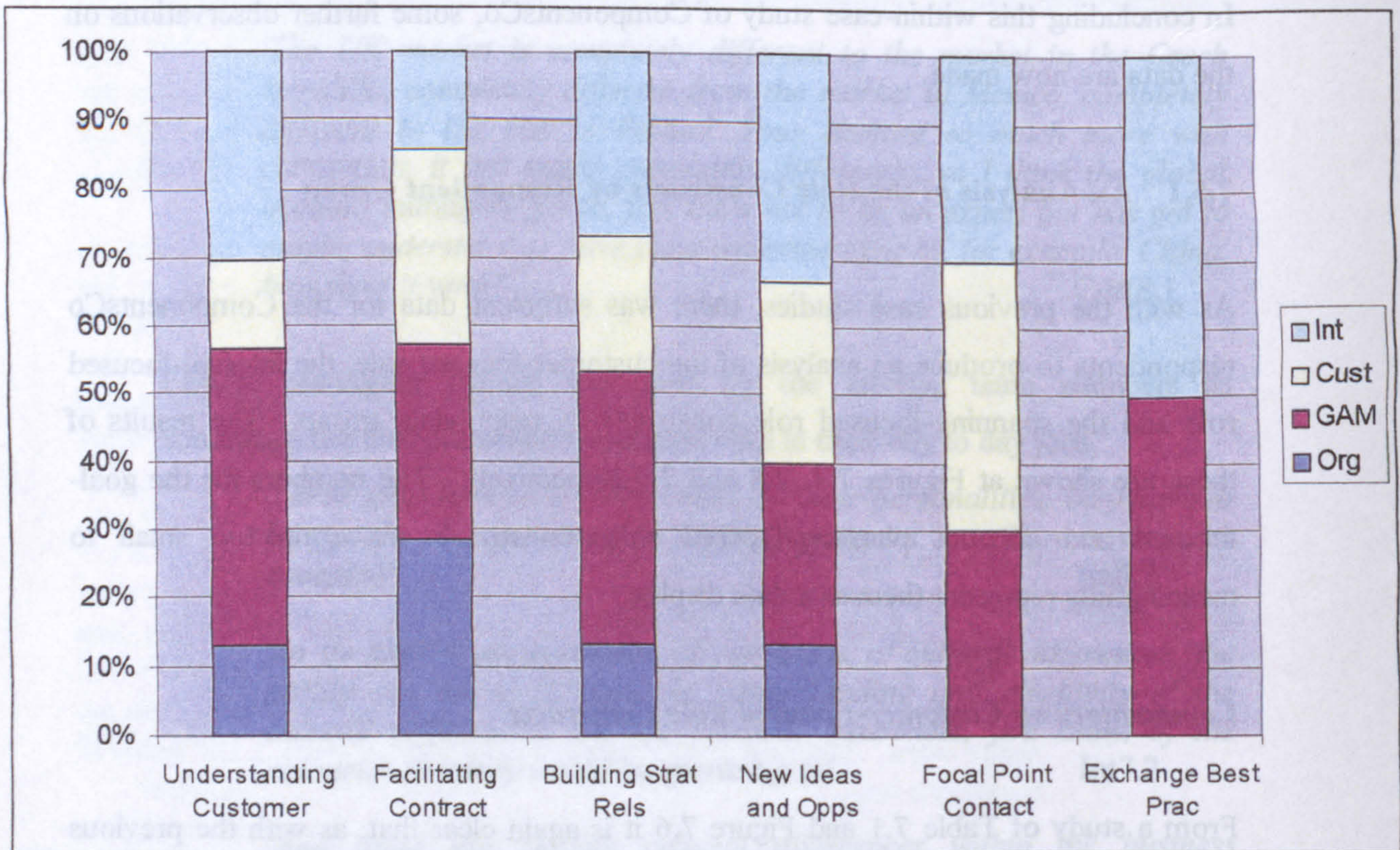
Commentary on Customer-Focused Role Constructs

From a study of Table 7.1 and Figure 7.6 it is again clear that, as with the previous two case studies, that there is a degree of congruence of views from all four respondent groups about the top four customer-focused role constructs that emerged from the ComponentsCo case study. However, while the top three constructs were the same in the previous two case studies, although in a different order, with the

ComponentsCo case study the second most mentioned role construct in terms of text unit count was *facilitating the contract*.

In the CourierCo case study this construct was evident from the data, but it was not one of the most important in terms of ranking order and it was not mentioned at all by the ComputerCo respondents. One explanation for this is that ComponentsCo has only been running its global account programme for a year. The global contracts are new and therefore at this stage in the global relationship more focus is being put on embedding the contract in both organisations and ensuring everyone is working under the global framework. The GAMs are also focusing heavily on *understanding the customer*, but there is less emphasis on the other two constructs, *building strategic relationships* and *developing new ideas and opportunities* when compared with the CourierCo data and the ComputerCo data.

Figure 7.6 Customer-Focused Role Constructs by Respondent Group



From some of the comments from the respondents it is also evident that the customers have been driving the global account programme and that while ComponentsCo have a vision of what they want to achieve with their global accounts, to some extent they

are in learning mode. It has already been suggested that *building strategic relationships* and *developing new ideas and opportunities* are strategic roles and that *understanding the customer* is not as strategic. *Facilitating the contract* is also suggested as a less strategic role. Therefore, the data suggests that at the early stages of GAM relationships, even if the overall relationship is seen as interdependent and strategic, that the customer-focused roles that will be of more importance in getting the global relationship established, will be *understanding the customer* and *facilitating the contract*. While it will still be important to *build strategic relationships* and *develop new ideas and opportunities*, these roles will be more important the longer the relationship has been established.

Commentary on the Internal-Focused Role Constructs

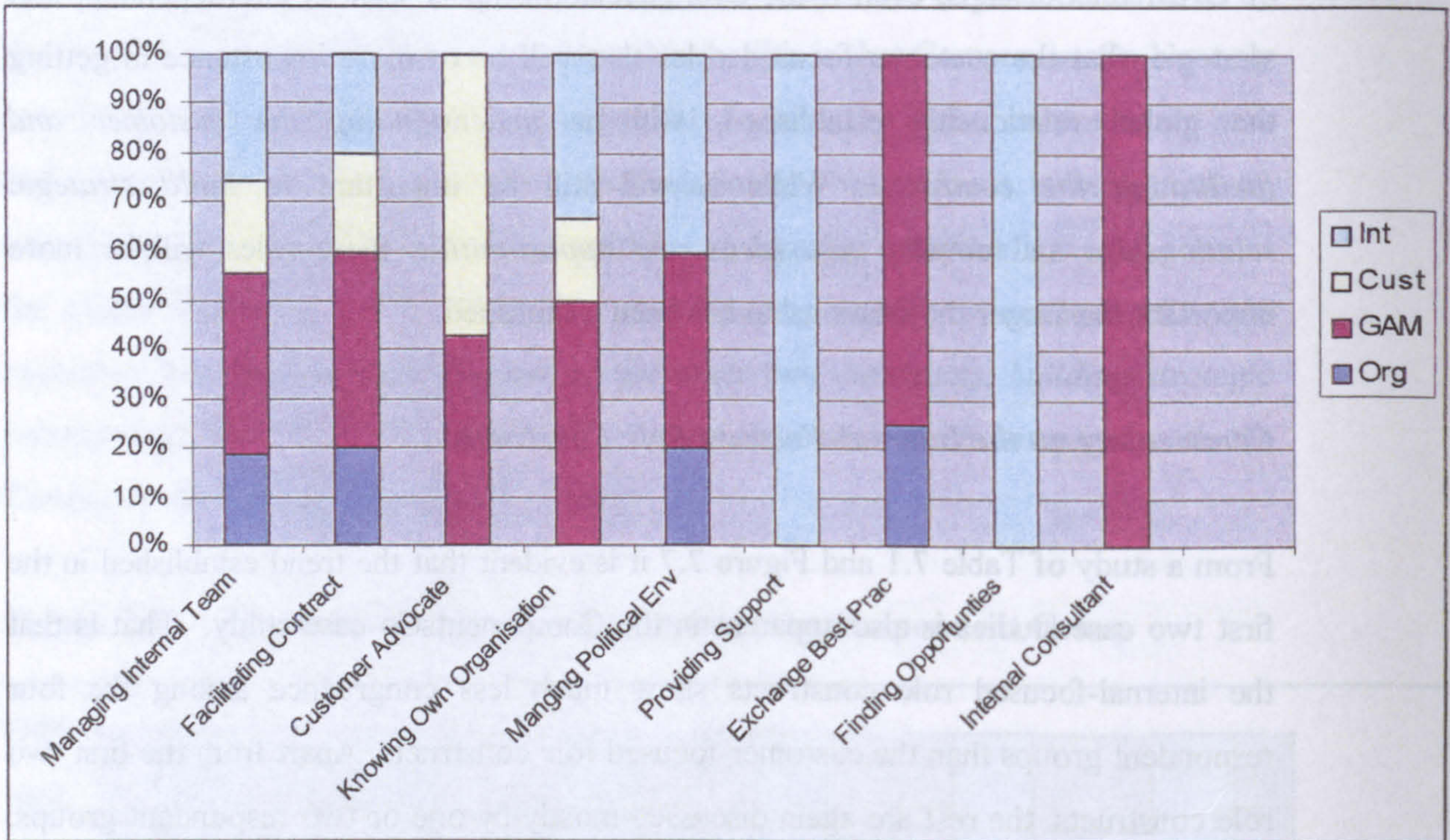
From a study of Table 7.1 and Figure 7.7 it is evident that the trend established in the first two case studies is also apparent in the ComponentsCo case study. That is that the internal-focused role constructs show much less congruence among the four respondent groups than the customer-focused role constructs. Apart from the first two role constructs, the rest are again discussed mostly by one or two respondent groups. This is consistent with the other two case studies.

Facilitating the contract internally emerged as an important construct and there were links between the comments on this and the need to undertake *internal marketing* which emerged as a sub-theme in the *managing communication* role construct. As with *facilitating the contract* in the customer's organisation, this construct did not feature at all in the ComputerCo data but was the second next most mentioned internal-focused construct for the ComponentsCo respondents. This suggests that the comments above are further supported in terms of the link between the focus of the organisation and the stage it is at with its global account management programme.

The *managing the internal team* construct again received the most comments from the respondents and the internal team members were again alone in identifying the *providing support* role. There are two possible explanations for the latter. One is that the GAMs have not recognised that part of their role is to support their internal team members in the way that is being articulated by the team members. Another

explanation that could apply across the three cases is that this is a role context issue in terms of terminology.

Figure 7.7 Internal-Focused Role Constructs by Respondent Group



The internal team members are using words that fit with their perspective on their role, while the GAMs are describing the role differently. The GAMs talk a lot about giving internal team members information and communication, best practice ideas and keeping them informed by team meetings and account plans and involving them in the account planning process. All these things could be said to be supporting the internal team members in what they need to achieve in their roles. However, the team members do specifically mention that they want the GAMs to open doors for them and do battle with their senior managers if necessary and to support them with business cases. None of the GAMs so far has commented on these aspects of their support role.

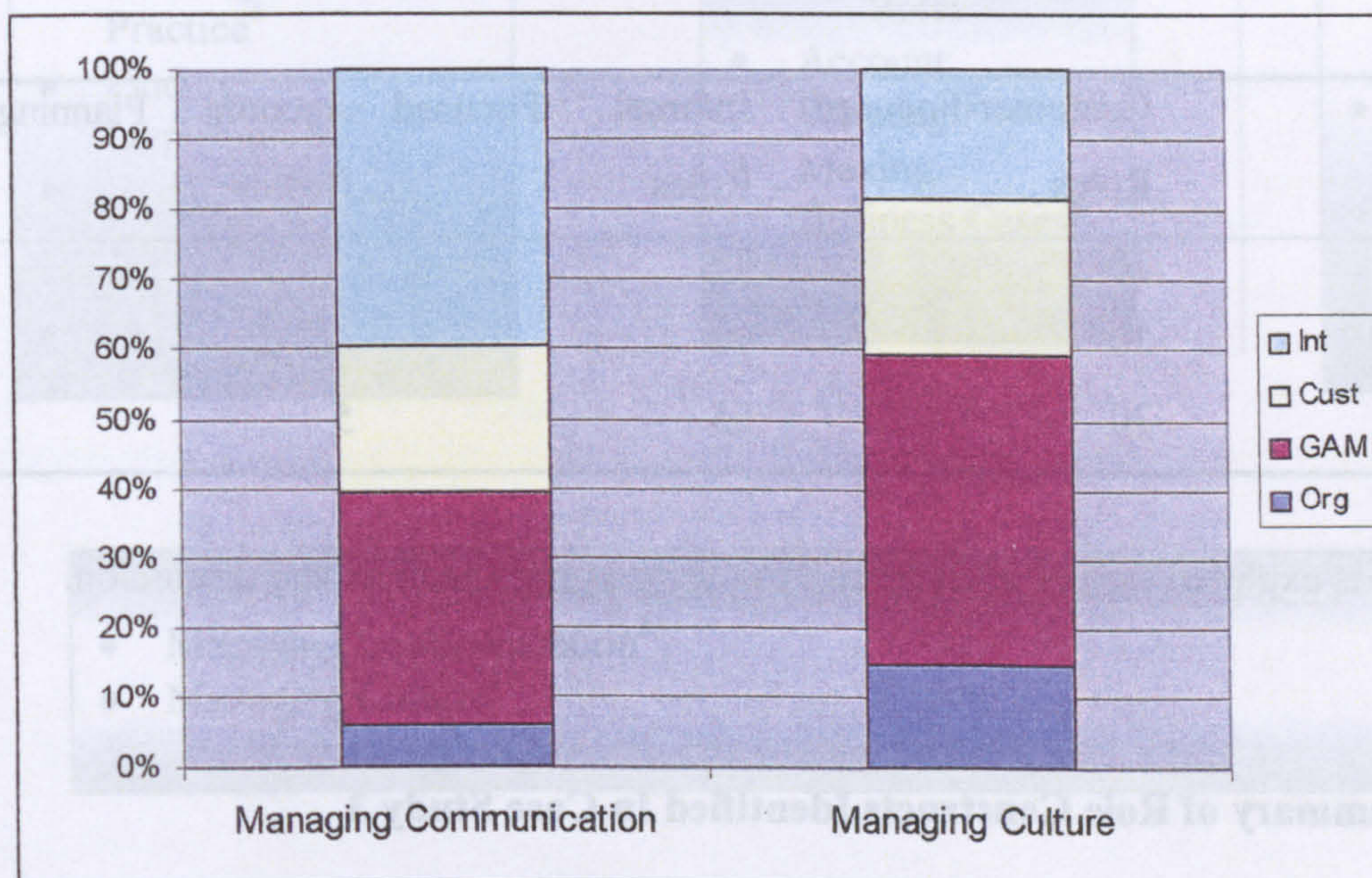
The conclusion is, that this is one of the roles that is required of the GAMs, but it is one of which they are not aware that they should be carrying out on behalf of their internal teams and colleagues.

Commentary on Spanning-Focused Role Constructs

Figure 7.8 represents the spanning-focused role constructs by respondent group. As with the previous two case studies, all four respondent groups commented on these two roles.

As well as supporting many of the sub-themes that emerged in the previous case studies, this case study contributed some further dimensions in terms of sub-themes to the *managing communications* construct. These were *internal marketing* in the supplier organisation about the global account and *external marketing* in the customer organisation for similar purposes. While there had been two references to internal marketing in the ComputerCo case study, this was the first of the case studies to specifically mention external marketing.

Figure 7.8 Spanning-Focused Role Constructs by Respondent Group



These two constructs proportionately had received more comments in terms of text unit counts from the respondents than they had in the other two case studies. The fact that these constructs were expressed more frequently in this case study, compared to the previous two case studies, raises a question.

As already suggested from the data from the CourierCo case study, these two constructs underpin the other four construct groups and if these are not addressed adequately then it is unlikely that the GAM would be effective in their role. As ComponentsCo have only been running their global accounts for a year, it suggests that, as with *facilitating the contract* and getting it working at the global level, that it will also be important for GAMs to focus on getting the communications right and on focusing on the cross-cultural management issues when the global account is in the earlier stages of development.

7.5.2 Proportion Of Time Spent Externally and Internally

As with the previous case studies Figure 7.9 shows how the GAMs in this case study estimated their time was spent.

Figure 7.9 Estimated Time Spent By GAMs on Different Aspects of their Role

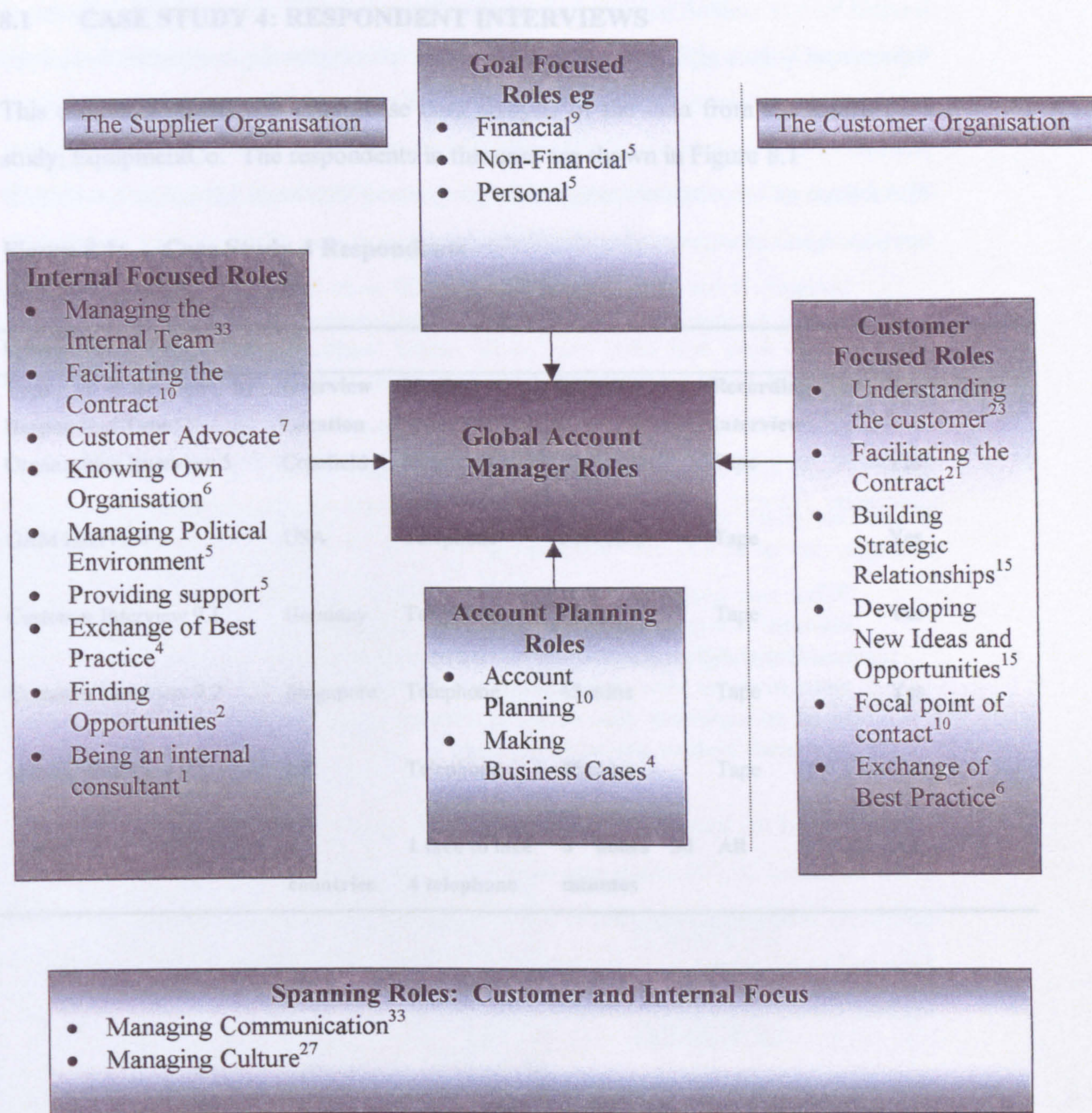
	Customer-Focused Roles	Internal Roles	Focused Account Roles	Planning
GAM6	20	75	5	
GAM7	30	70	0	
GAM8	30	65	5	

This point is explored further in Chapter 9 in the cross-case analysis and discussion.

7.5.3 Summary of Role Constructs Identified In Case Study 3

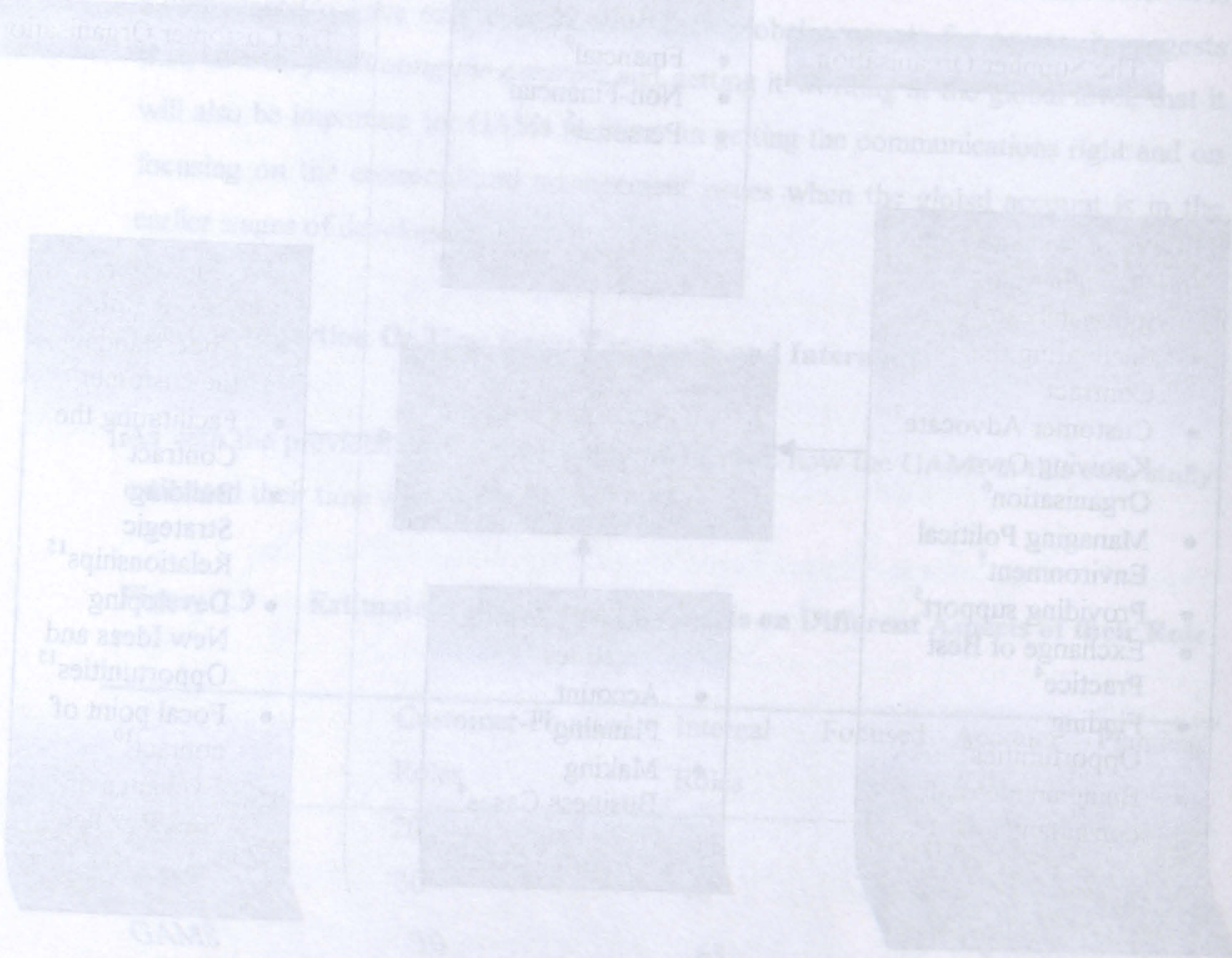
Finally for case study 3, a summary of the roles is presented in Figure 7.10. This shows the full range of role constructs identified by all the respondents in this case study. They are presented in text unit count order with those carrying the most text units at the top of each role category.

Figure 7.10: Summary of Roles Constructs Identified in Case Study 3.



Having discussed the findings from the third case study in Chapter 7, Chapter 8 now discusses the data from the fourth Case Study, EquipmentCo.

As a result, a summary of the research is provided in Table 1. The research is organized into two main sections: the first section describes the research design and the second section describes the research findings.



IMAD

Table 1. Summary of the research design and findings.

The research design is based on a combination of qualitative and quantitative methods. The qualitative methods include interviews, focus groups, and document analysis. The quantitative methods include surveys and statistical analysis. The research findings are presented in the following sections.

CHAPTER 8: CASE STUDY 4: EQUIPMENTCO

8.1 CASE STUDY 4: RESPONDENT INTERVIEWS

This chapter contains the within-case data analysis of the data from the fourth case study; EquipmentCo. The respondents in this case are shown in Figure 8.1

Figure 8.1: Case Study 4 Respondents

CASE STUDY 4						
Type of Interview by Respondent Type	Interview Location	Medium	Length	Recording of Interview	Transcribed	
Organisation Interview 5	Cranfield	Face to Face	2.5 hours	Tape	Yes	
GAM Interview 9	USA	Telephone	1.5 hours	Tape	Yes	
Customer Interview 9.1	Germany	Telephone	1 hour	Tape	Yes	
Customer Interview 9.2	Singapore	Telephone	45 mins	Tape	Yes	
Internal Interview 9.3	UK	Telephone	45 mins	Tape	Yes	
Total: 5	4 countries	1 face to face 4 telephone	6 hours 30 minutes	All	All	

8.2 CASE STUDY BACKGROUND

EquipmentCo is a global company specialising in complex equipment for banks and retailers in particular. They have customers in all regions of the world.

The formal global account management programme had been formulated in 1996/97 but the organisation respondent felt that:

'Actually it has been running for about 20 years informally. A lot of the banks and in particular, retailers have had multi-national operations for some time so we have had what used to be called 'multi-national accounts' for some time'. Org5

It was set up primarily to facilitate and support *'doing the business better with global customers [Org5]'*. It was also driven by the need for the organisation to take a strategic view of its account management:

'What was happening over the last 20 years was that we've had this multi-national accounts programme...it was always being chopped and changed, you know, different versions of the programme and it was then decided that a more strategic view should be taken. The global account management was felt to be so important that we needed to get processes and procedures in place that would outlive any sales structure'. Org5

At the time of the interviews in early 2002, the company had 100 global accounts out of an estimated 20,000 customers worldwide. They were selected against a strict set of criteria which was contained in a formal *Global Account Registration Form*. This form had to be submitted to the business unit Senior Vice President who approved the registration and it was then formally *registered* as a global account.

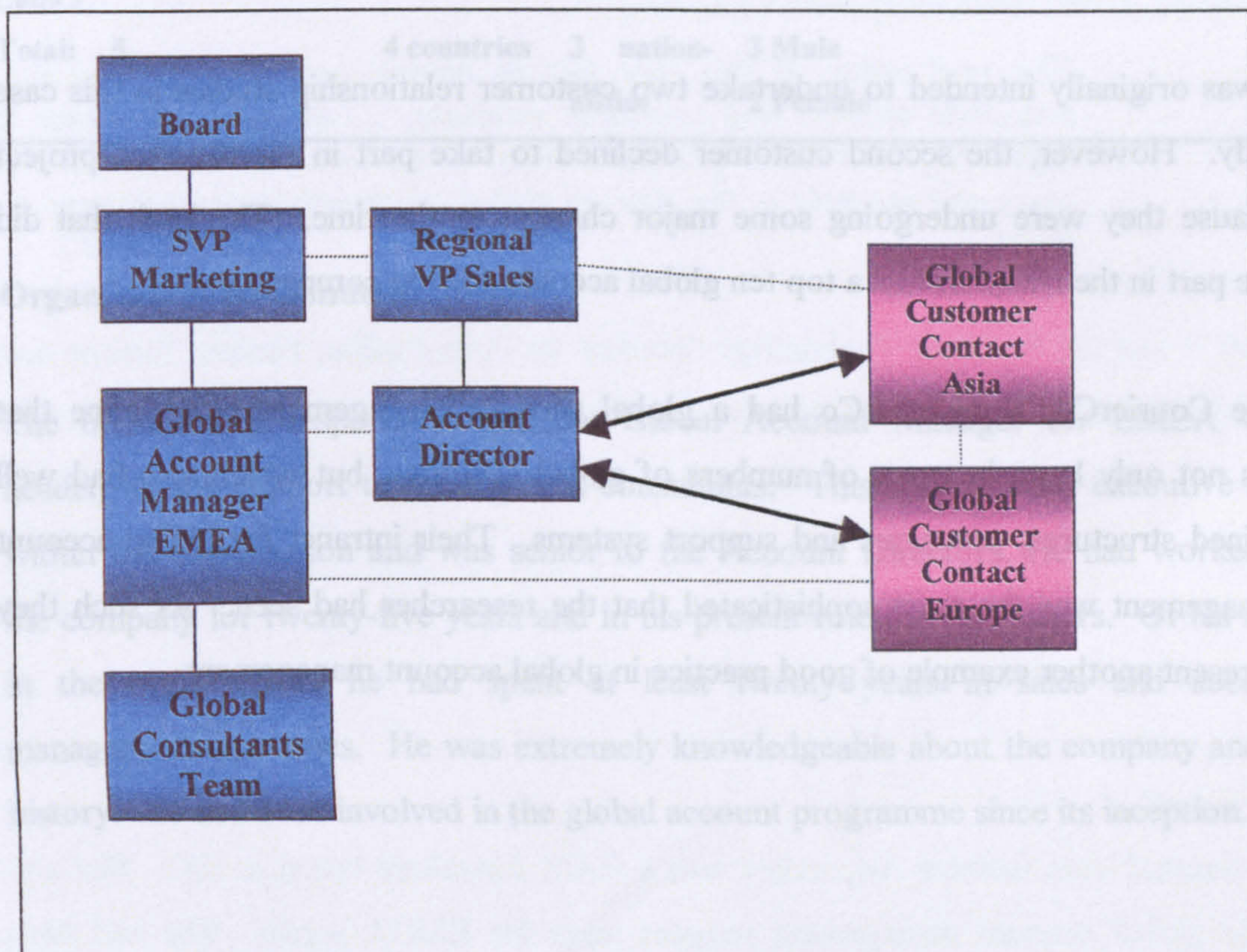
The people in the global account manager positions did not have the title *Global Account Manager*, but were designated *Account Directors*. Once their account had been designated a global account then that person was compensated for business on that account anywhere in the world.

'This is critical to the success of the global account management programme. It encourages them to take and develop the business and grow a wider perspective and interest in that account'. Org5

These people were supported around the world by four support teams, who were termed *GAM consultants*. Part of their job was to provide consultancy, and support on issues of a global nature. They were linked in to a network of Subject Matter Experts (SMEs) who had been chosen for the strong focus and knowledge on key aspects that had an impact on global business, such as taxes, import/export rules, contracts and logistics. The consultants prime role was to know who to go to, and who to contact, as well as helping the Account Directors with global opportunities. The remit of the Consultants and the SMEs was to '*drive global excellence, consistency and customer satisfaction (Org5).*'

The title of the people running the consultancy teams needs to be explained, as it could cause confusion. The organisation called these key people who headed up the support teams for the GAMs, *Global Account Managers*. There was four of these support teams. One in the Americas, one in Asia Pacific, one in Japan and one in EMEA.

Figure 8.2: A Typical Organisation Structure for Managing a Global Account



The Account Directors reported into their regional VP for Sales. They would be located in the region which was most appropriate for their dealings with the customer. Of the four case studies, this was the only one where the global account managers were reporting in to the wider sales structure. Interestingly, the four support team managers didn't report into the sales structure but to the SVP for Marketing of the whole corporation. A typical organisation structure for managing a Global Account is in Figure 8.2.

The organisation had an intranet site specifically for the global account management programme which had the following contents:

- Introduction
- Getting Started
- GAM Contact List
- Major Programme Elements
- Approved Global Accounts
- Forms, Tools and Templates
- Glossary of Terms

It was originally intended to undertake two customer relationship studies in this case study. However, the second customer declined to take part in the research project because they were undergoing some major changes at the time. The bank that did take part in the research was a top ten global account for the company.

Like CourierCo, EquipmentCo had a global account management programme that was not only large in terms of numbers of global accounts, but which also had well defined structures, processes and support systems. Their intranet for global account management was the most sophisticated that the researcher had seen. As such they represent another example of good practice in global account management.

8.3 CASE STUDY 4: RESPONDENT PROFILES

The attribute data recorded for the fourth case study was identical to that described in paragraph 5.3 of Case Study 1. The attribute data profiles for the EquipmentCo respondents are shown in Figure 8.3.

Figure 8.3: Case Study 4 Respondent Profiles: Attribute Data

CASE STUDY 4						
Respondent Type	Work Location	Nationality	Gender	Job Title	Time in Current Job	Age
Organisation Interview 5 <i>Org5</i>	UK	British	Male	GAM EMEA	3 years	44
GAM Interview 9 <i>GAM9</i>	USA	American	Female	Account Director	2 years	35
Customer Interview 9.1 <i>Cust9.1</i>	Germany	British	Male	Regional Tech Director	5 years	X
Customer Interview 9.2 <i>Cust9.2</i>	Singapore	Indian	Male	Regional Tech Director	5 years	X
Internal Interview 9.3 <i>Cust9.3</i>	UK	American	Female	Global Consultant	1 year	28
Total: 5	4 countries	3 nationalities	3 Male 2 Female			

Organisation Respondent

The organisation respondent was the Global Account Manager for EMEA who headed up the support team of global consultants. This was a senior executive role within the organisation and was senior to the Account Directors. He had worked in the company for twenty-five years and in his present role for three years. Of his time in the organisation, he had spent at least twenty years in sales and account management type roles. He was extremely knowledgeable about the company and its history. He had been involved in the global account programme since its inception.

Global Account Manager Respondent

The Account Director was based in the US, and her customer was a major global bank. The bank had been a customer of the organisation for as long as it had been doing business, which was over 50 years. She had worked in the company for a total of twelve years. She had been in her current account management role for two and a half years after since returning from taking a career break. She described her background as *weird* as she had originally been an accountant.

Customer Respondents

For GAM9

Cust9.1 was the Regional Technical Director for Europe, and he was based in Germany. His nationality was British. He had been with the company for 15 years and had been in his current role for 5 years. Both he and Cust9.2 had the same job in their respective regions. They were responsible for the team of people who supported the bank's frontline systems, management information systems, their data warehouses and customer relationship management (CRM) systems. He saw a lot of value in having the global relationship with EquipmentCo.

'The real value of this role lies in having consistent approaches, consistent answers and consistent solutions. ...I am abreast of what is happening both within [EquipmentCo] and within [the Bank] and this is a good example of the type of global relationship that you want to have'.

Cust9.1

Cust9.2 was the Regional Technology Director for Asia Pacific, Eastern Europe and the Middle East (18 countries). He was based in Singapore although he had been born in India. He had been with the bank for 19 years and had been in his current role for 5 years.

Internal Team Member Respondent

For GAM9

The internal team member respondent was a GAM consultant based in UK. She was in the global account management support team for EMEA region. She had been

doing a similar role based in the USA, and had been in her current job in Europe for nearly a year.

Having looked at the background to the global account management programme for Case Study 4 and at the respondent profiles, the role constructs for global account managers as they emerged from the data analysis, are now discussed.

As with the previous three case studies, the data from this fourth case study were analysed against the role codes as the previous case studies (see Paragraph 4.4.4) to identify the role constructs that are shown in Table 8.1. As with the previous three case studies, these are presented in order of highest unit count.

Table 8.1 Equipment Co Role Constructs: Count by Unit Location

Role Construct	601	Test Unit	Respondent Group	Int	Org	GAM	Int
Goal Focused	9	✓	✓	✓	✓	✓	✓
Financial	3	✓					
Personal	3	✓					
Developing New Ideas and Opportunities	12	✓	✓	✓	✓	✓	✓
Understanding the Customer	10	✓	✓	✓	✓	✓	✓
Facilitating the Contract	2	✓					
Internal Team: Managing Team	8	✓	✓	✓	✓	✓	✓
Internal Team: Supporting Team	1	✓					
Internal Team: Different Teams	3	✓	✓	✓	✓	✓	✓
Knowing Own Organisation	7	✓	✓	✓	✓	✓	✓

8.4 EQUIPMENTCO ROLE CONSTRUCTS

The EquipmentCo role constructs as they emerged from the data are now presented and discussed. See paragraph 5.4 of the CourierCo case study for a description of how the role constructs were analysed. As is consistent with a literal replication study, the data from this fourth case study were analysed against the same top level codes as the previous case studies (see Paragraph 4.4). The EquipmentCo role constructs are shown in Table 8.1. As with the previous three case studies, these are presented in order of by text unit count.

Table 8.1 EquipmentCo Role Constructs: Count By Text Unit

Role Construct	Text Unit Count	Respondent Group			
		Org	GAM	Cust	Int
Goal Focused	9	√	√		
Financial	3	√	√		
Personal	3		√		
Non-Financial	3		√		
Customer Focused	41				
Developing New Ideas and Opportunities	12	√	√	√	√
Understanding the Customer	10	√	√	√	√
Building Strategic Relationships	8	√	√	√	√
Focal Point of Contact	7	√	√	√	√
Exchange of Best Practice	2		√	√	
Facilitating the Contract	2		√		√
Internal Focused	31	√	√	√	√
Managing Internal Team	15	√	√	√	√
<i>Internal Team: Managing Team</i>	8	√	√	√	√
<i>Internal Team: Managing Virtual Team</i>	4	√	√	√	
<i>Internal Team: Motivating Team</i>	1		√		
<i>Internal Team: Different Teams</i>	2	√			
Knowing Own Organisation	7	√	√	√	

Managing Political Environment	4	√	√		
Providing Support	2				√
Customer Advocate	2			√	
Exchange Best Practice Internally	1		√		
Internal Consultant	0				
Facilitating Contract	0				
Finding Opportunities	0				
Account Planning Focused	12	√	√	√	√
Account Planning	8	√	√		√
Making Business Cases	4	√		√	
Spanning Focused	13	√	√	√	√
Managing Communication	8	√	√	√	√
Managing Culture	5	√	√		√
Total	106				

8.4.1 Goal-Focused Role Constructs

As with the previous three case studies, the goal-focused role constructs covered three sub-themes; *financial targets*, *non-financial targets* and *personal targets*.

Financial Targets

Both growing the business in volume terms, and growing the profitability of the global account, were seen by the organisation as the primary focuses of the GAM. However, the Account Directors did not have profit and loss accountability.

'This is their primary focus and their main goal. We want them to take \$1m accounts and grow them to \$4m or even \$5m accounts over three years.They also have a margin as well as a revenue target'

Org5

'I have financial targets but not P&L responsibility'

GAM9

Non-Financial Targets

The Account Directors had a number of non-financial targets. In particular, they had several targets relating to the global account plan. These are discussed in more detail in the Account Planning Role Constructs below. In fact, the Organisation respondent made the point that they were moving away from purely financial targets, to targets that measured Account Directors on their service and delivery for the customer, on their leadership of the account team, and on their account planning.

Personal Targets

GAM9 also mentioned three personal goals that she had for the customer. The first two were a) to improve her relationships with two key senior people in the customer and b) to spend more time on the customer and less time internally. However, she said that her biggest goal was:

"But the biggest thing that I want to achieve now is to make us easy to do business with for [the customer]" GAM9

8.4.2 Customer-Focused Role Constructs

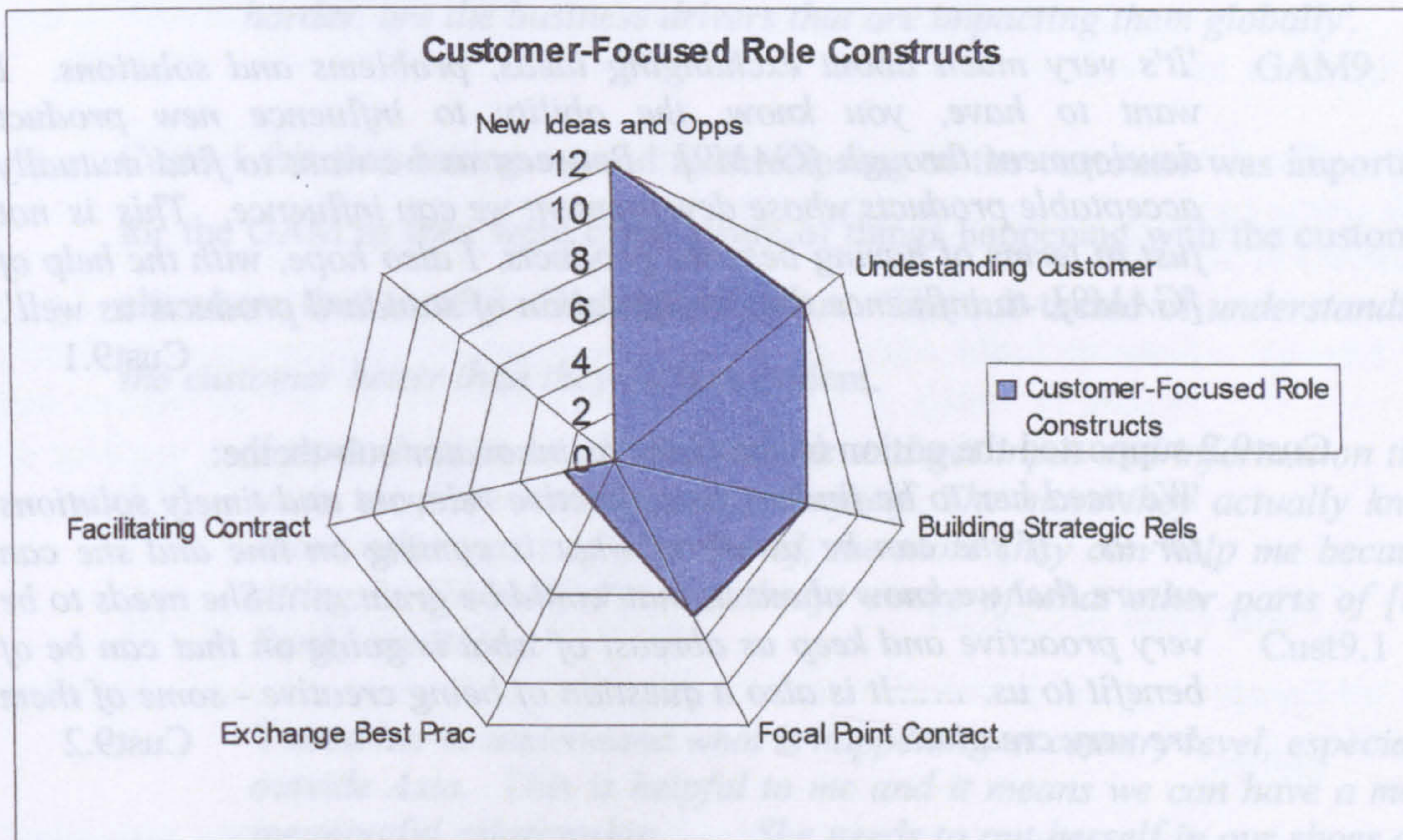
The chart in Figure 8.4 represents the text unit count for each customer-focused construct. As this case study only features a single customer relationship, the numbers are small. However, there is enough difference in terms of most-mentioned to least-mentioned to make the display the data.

Developing New Ideas and Opportunities

Like ComputerCo, *developing new ideas and opportunities* was the top construct in terms of text unit count for the EquipmentCo respondents. Both the ComputerCo and EquipmentCo customer relationships are well established globally so both customer and supplier organisations can focus on developing new ideas and opportunities. Org5 described this role in terms the sub-theme of *developing bespoke solutions*.

'What they need to do, well it's new product development, only in this case it is specifically for the customer.The larger banks and retailers want bespoke, specific offerings' Org5

Figure 8.4 Customer-Focused Role Constructs by Text Unit Count



The organisation respondent also described the role as being like a consultant.

'When you are dealing with truly major accounts, you're really looking for a consultant style of approach with the customer. You can't have a 'gung ho' sales approach because that spells risk. These people have to have a broader approach and have to be capable of developing broader business capabilities'.

Org5

The GAM saw this activity as being strategic, and about helping the customer to think through their strategies.

'I need to, kind of, identify the strategies that will support their initiatives'.

GAM9

'I should be helping them develop strategically. Bring some new ideas, for example, for their ATM strategy'.

GAM9

This was seen as a key area by Cust9.1 who also saw it as *developing common business opportunities.*

'My main goal for the relationship is to get information on new products. I want to know well in advance from where things are coming. I also want information on different types of solutions.I

want a global account manager to keep me informed of new developments, new products and plans. I particularly want a road map for next year and into the future'. Cust9.1

'It's very much about exchanging ideas, problems and solutions. I want to have, you know, the ability to influence new product development through [GAM9]. Between us we want to find mutually acceptable products whose development we can influence. This is not just in terms of having bespoke products, I also hope, with the help of [GAM9], to influence the configuration of standard products as well'. Cust9.1

Cust9.2 supported the notion of the *GAM as innovator* sub-theme:

'We need her to be finding cost effective relevant and timely solutions for us. If she can be aware of what is coming on line and she can ensure that we know about it, that would be great.She needs to be very proactive and keep us abreast of what is going on that can be of benefit to us.It is also a question of being creative - some of them are very creative'. Cust9.2

Understanding the Customer

A number of the sub-themes described in the ComputerCo case study also emerged from the EquipmentCo case study. All four respondents commented on *understanding the customer*. The organisation respondent, while stressing the important of *understanding the customer's industry*, also made the point that any new ideas that were developed, needed to be based on sound business knowledge and understanding. Evidence of good customer understanding also gives the customer reassurance.

'What the truly global organisation wants is stability and safety. They cannot afford to roll out some half-baked idea because they might cripple their organisation. They are much more interested in having a conversation with someone who is knowledgeable, is a steady pair of hands and really understands their business'. Org5

'It's more about understanding the industry, knowing the industry. In fact an industry background in say, either banking or retailing is helpful. It is understanding what the technologies are and knowing how to make a business case for them'. Org5

The GAM needed to know the customer well in order to formulate the customer strategy internally for the team.

'Well, first of all I need to understand what their business priorities are, you know, what's their strategy, what's their objectives, what are the driving factors that's causing them to make some of the day to day

decisions they are making. And that's key because if I don't understand that then it's hard to set a strategy for the team.In particular, I need to make sure that I understand, which is even harder, are the business drivers that are impacting them globally'.

GAM9

Cust9.1 felt that having a good understanding of the customer was important for the GAM as they were often aware of things happening with the customer elsewhere that Cust9.1 didn't know about. The sub-theme of *understanding the customer better than they do* was evident.

'I want them to be able to provide and get input and information that saves me from having to do it myself. The more they actually know about other parts of [the Bank], the more they can help me because sitting in Germany I'm not always aware of what other parts of [the Bank] are doing'.

Cust9.1

'I need her to understand what is happening at country level, especially outside Asia. This is helpful to me and it means we can have a more meaningful relationship.She needs to put herself in our shoes and try to see how, we, as her customer might benefit from what [EquipmentCo] have to offer'.

Cust9.2

There was an expectation from the internal team member that understanding the customer was the GAM's job.

'She does know a lot about the customer, but then, you know, that is her job. I can provide the internal statistics and financials for our area, but when it comes to really knowing the customer, knowing them in depth, particularly from the global point of view, the [GAM9] is in the frame'.

Int9.3

Building Strategic Relationships

Some of the relationships with the global customers went back twenty or thirty years and in the case of GAM9's customer, fifty years. It was expected that GAMs had senior level strategic involvement with customers.

'They are usually, with the big banks, for example, operating at a senior director level or senior IT manager level who may be involved in global vendor management or global procurement. If they are not operating at this level they wouldn't be building the type of relationship that we expect of them'.

Org5

This GAM also saw building a *multi-level relationship* as part of her role.

'One of the key things is that it is important for me to set the strategy with the customer and also to establish executive relationships so that they have, you know, relationships with senior executives in our organisation. I have to establish relationships at various levels'.

GAM9

The internal team members saw building the strategic relationships was the responsibility of the GAM:

'It comes back to the fact of how we are organised globally. I may have to build some good relationships with the customer in EMEA region, or really, if I'm honest in, Europe, but I can't go beyond that really. It either has to be [my boss] or [GAM9] that is working on building relationships with the top guys'.

Int9.3

Focal Point of Contact

Being the focal point of contact was also expressed by all four respondent groups:

'The customer wants a focused point of contact. Someone who knows his businessand someone who he goes to when he has a problem that needs to be dealt with at senior level'.

Org5

'I think they're looking for a single point of contact. [The main contact], he's expecting me to be able to understand that, co-ordinate that and communicate the direction to the individual in [EquipmentCo] that they need to work with'.

GAM9

'I want a defined point of entry, like the Account Director, as this avoids a lot of misunderstanding'.

Cust9.1

'We are very keen to have a single point of contact who can talk to the respective countries and make things happen'.

Cust9.2

However, the point was made that while [GAM9] was the main point of contact, she could not handle all of the day to day contact herself.

'She has to be a main point of contact for the customer, you know, for the critical things mostly. She could not handle all the contact with the customer. She's very good, though if I need to know who to go to in the customer and she will introduce me to key customer people. I am always much happier when I know the face behind the voice, but it's not always possible in this global scene'.

Int9.3

Exchange of Best Practice

Cust9.1 saw the GAM's position as one that could facilitate the exchange of best practice.

'I want to be kept aware of other areas where [we] are interacting with [EquipmentCo] in case there are good ideas that I can use in Germany and more widely in Europe.I want them to use their contacts and experience to help me'.

Cust9.1

Facilitating the Contract

Finally, as with the previous case study, *facilitating the contract* was seen as part of the responsibility of the job.

'I co-ordinate all the global contracts and all the agreements that are in place'.

GAM9

8.4.3 Internal-Focused Role Constructs

Having presented the customer-focused role constructs that were found in the analysis of the EquipmentCo interviews, the internal role constructs are now explored. Figure 8.5 represents the text unit count for the internal-focused role constructs.

Managing the Internal Team

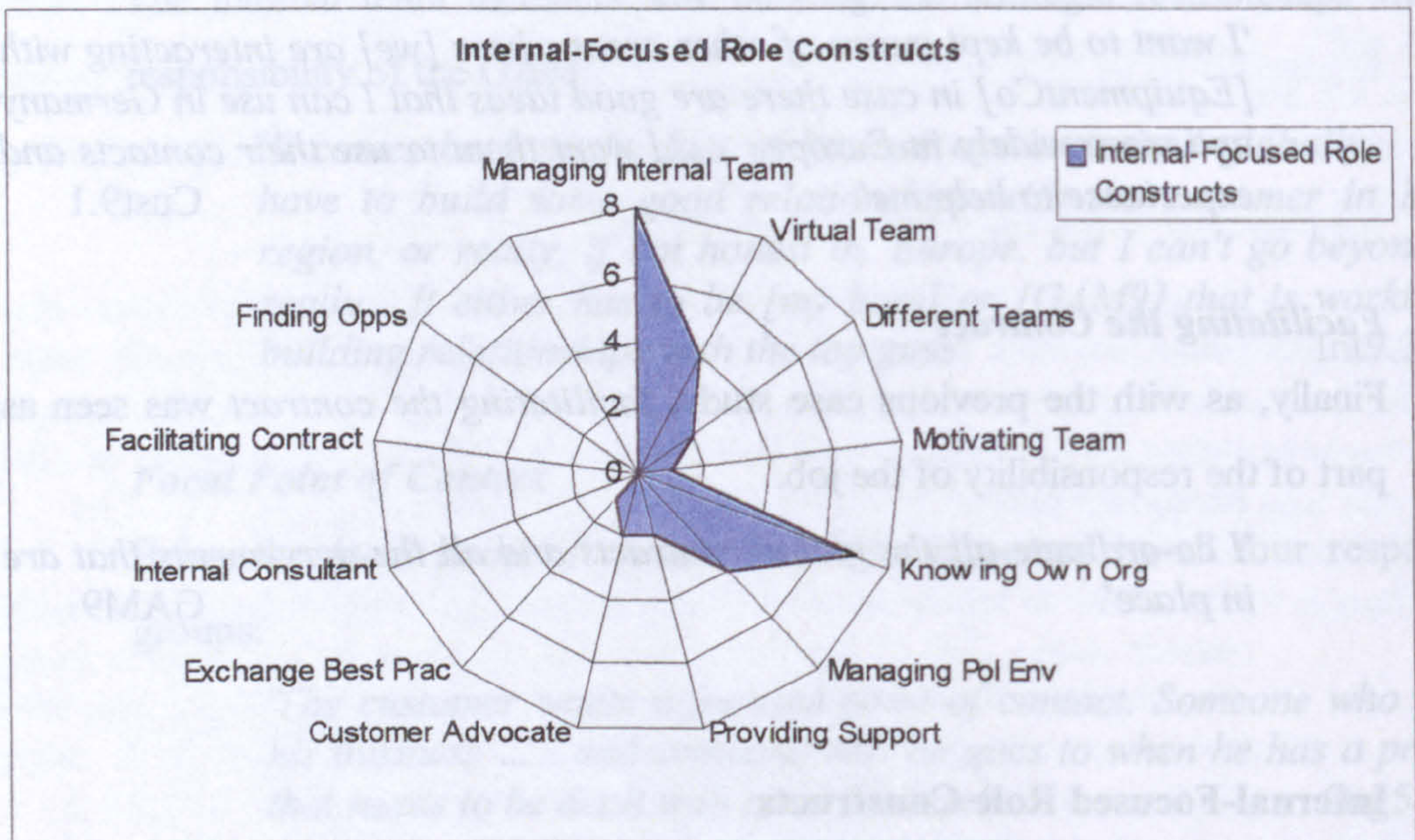
As with all the previous case studies, managing the internal team was the most mentioned internal-focused construct. The sub-themes discussed in the previous case studies were also once again evident in this final case study.

As already discussed in paragraph 8.2, there were a significant number of people in this organisation who could form part of the *virtual team*, who were all specialists in aspects of the company's offering and services. The Account Director might be called upon to lead a team for a specific customer project or lead a team that was running the day to day business. The following is a good example of a customer account team.

'They will have solutions sales specialists to call on and production specialists, pre-sales and post-sales service people. They are all part of the wider sales team and they're working together, but they don't

report into the Account Director. But, they are the main link across this team, this virtual sales team'. Org5

Figure 8.5 Internal-Focused Role Constructs by Text Unit Count



Managing or leading the team was mentioned several times by the GAM, and she also stressed this involved a lot of work internally that could be very frustrating.

GAM9 'I have put a regional team in place with someone in Europe and someone in Asia that will help me and act on my behalf with the customer in those regions. I cannot keep getting on a plane'.

SH 'OK. So, you'll have a sort of key account team for the customer?'

GAM9 'Right'.

SH 'And will those people report to you?'

GAM9 'It's going to be a major supporting team for me, but they'll report to the regional organisations'.

.....
 'You need to be a facilitator. You need to have some sort of leadership skills, so that you can give direction'. GAM9

'You have to be good at driving team consensus'. GAM9

Customers once again described an internal team leadership role for the GAM.

'They need to have good leadership skills as they are managing virtual teams and influencing teams of people that don't work for them. I know this is an important thing to do, as I have to do it all the time in

my role'.

Cust9.1

'They almost need to be good at 'stealing people's time' so that they don't know you are actually using them to help you'.

Cust9.1

Int9.3 also articulated a team leadership role for the GAM.

'I see [GAM9] about three or four times a year at team meetings. But the rest of the time it's by email or telephone. However, I do rely on her to co-ordinate what my counterparts are doing in the other regions. We're all part of the global account team even though we rarely sit round a table together',

Int9.3

Knowing Own Organisation

Knowing your organisation was also seen as a way of leveraging internal capability.

'If you've got a good idea and really know the capabilities of your own organisation, you can exploit the system and reap the rewards and grow the business. And have a very happy customer because they are continually coming to us, the banks, these big accounts, and want to know more about what we are doing because they just don't have these systems in place'.

Org5

It was important to the customer that the Account Director knew all the right contacts in their own organisation.

'In terms of knowledge, I think it's very important for [GAM9] to know all the right contacts within [EquipmentCo], thus enabling them to cut through the red tape. They can go directly to the people they need to in terms of getting an answer for [the Bank]'.

Cust9.1

'She needs to have a very good knowledge of [EquipmentCo].

Cust9.2

The Account Director stressed that the internal structure of EquipmentCo to manage the global accounts meant that she should always be able to quickly tap in to what was happening in her own organisation.

'[Org5] has explained our structure to youyou know about the GAM consultancy team and the SMEs. This means I have a knowledge network for our organisation which I can immediately consult if I need to. If I don't know something about our own organisation, someone else will'.

GAM9

Managing the Political Environment

The word *diplomat* was used again in this case study rather than the word *politician*.

'I don't just need to be a diplomat, I need to have a Masters of Diplomacy. I laugh, but in all seriousness on this account there are a lot of skills I need to have.....I need a knowledge of our global industry and what's going on so that I can help drive things for [us] or to help influence developments internally' GAM9

'The Account Directors need to be good at diplomacy especially with their internal contacts' Org5

Providing Support

The internal team member saw his role as being the supportive one in the relationship with the GAM, although he did have an expectation that the GAM would provide support upwards.

'Well, really it's my job to support her in her job rather than vice versa.I am a resource on which she can call.But I guess I do, you know, hope that she supports me with senior managers and defends what we are doing, even if things haven't gone well' Int9.3

Customer Advocate

This was to do with being able to influence the GAM's own organisation on the customer's behalf.

'I see [GAM9] as influencing strongly [EquipmentCo] internally on my behalf to ensure that they have a consistent approach to the customer. I see them as driving a common base of understanding within [EquipmentCo] locally' Cust9.1

'They also need to be quite skilled at internal marketing within their own organisation to sell ideas that can help us that we want to proceed with. They have to, if you like, put our case for us' Cust9.1.

8.4.4 Account Planning Role Constructs

The organisation had a very structured format for global account plans which all the Account Directors used. The global account plan was treated as a strategic document that unified the global team with the destination country team, and which

communicated the strategic intent of the global account team to other stakeholders in the country. Account Directors were seen as accountable for the ongoing development, updating and communication of the plan. There were two further instructions to the Account Directors:

1. They had to bring the account team together twice a year for a complete validation/refresh of the account plan.
2. Global account teams at global and local level must collaborate on the account plan development.

Account Planning

The account plan was used as a communication tool for the GAM.

'There is an international account plan for all the global customers. We had a global account planning session a few weeks ago in which I was involved. We flew in 15 people from around the world for 2½ days because it was so important. We have a formal global account plan document which the GAM uses to make sure that everyone understands what is going on!'

Org5

The account planning process was formal and occasionally involved the customer in part of the process.

'We have a formal plan that we do at the beginning of the year and actually we're doing it now.I do it with the team.We have put a template in from each of the countries so that we get an understanding of what their initiatives are, what are their key issues and opportunities so that we can incorporate that to create the global account plan!'

GAM9

'Sometimes I have gone through and shared some thoughts with the customer about the plan!'

GAM9

'They've done a great job training us on account planning!'

GAM9

The final production of the plan was seen as the job of the GAM, but the ownership was by the whole team.

'It's the Account Director's responsibility to produce the final account plan. However, we all get involved in making some input so I guess in the end we do all sort of own it!'

Int9.3

'But it is the team's plan. It has to be the team's plan. It's about facilitating dialogue, not telling it!'

GAM9

Making Business Cases

Cust9.1 felt the GAMs needed to have business acumen, and the ability to make business cases.

'They need to be able to judge business opportunities. They need to assess what these might be. They need to be flexible in looking at issues and they need to be able to build business cases. This requires them to be quite entrepreneurial. For example, they should be able to judge what might be a short- term loss but a long- term gain.'

Cust9.1

8.4.5 Spanning-Focused Role Constructs: Customer and Internal Focus

Finally, the spanning-focused role constructs found in the EquipmentCo case study are now explored. The spanning role constructs and their sub-themes are explained in paragraph 5.4.5 and in Figure 5.7.

Managing Communication

This Account Director felt that managing communication was a major part of her role.

'Communication is huge in everything, you know, both ways. GAM9

*'I think the biggest thing I have to do is to convince people in this organisation that we really need to do this for [the customer]. The biggest challenge I have is getting [my company]'s regional management team and saying look, this is what we're doing, this is what I need out of you and get them to respond back in a timely manner. It's a huge issue and it's very time consuming and very frustrating'.I'm spending a lot of my time trying to drive our services organisation'.
GAM9*

Getting consistent information from the Account Director was important, as it saved the customer time.

*'I expect consistency in the business information and information generally - this is very important to me. It makes things so much more efficient.I am looking to them to save me time'.
Cust9.1*

*'There has to be constant dialogue and a mutual understanding of expectations between me and [GAM9].
Cust9.2*

'There is a need to look at the big picture and looking to understand how the two operations can work together'. Cust9.1

Because of the way that [EquipmentCo] is split into four geographic regions, the Account Director is seen as the only person who really has a cross-regional viewpoint.

'In my role it is very important that the Account Director gives me as much information as possible about the account that she has learned, especially about what is happening in the other three regions. Although I concentrate on EMEA sometimes I need to attend global team meetings, so it's helpful to know what's going on elsewhere'.

Int9.

Managing Different Cultures

Finally, *managing different cultures* was mentioned as something the Account Director needed to deal with. She also found this one of her biggest challenges.

'It's easy if I'm doing it in the US. But what if I'm doing it in Germany? When you have the language and the cultural type barriers. It's bad enough face to face, but over the phone it's very difficult...Asia's a tough one for me to understand, you know, their culture.....You really have to be someone that understands cultures'.

GAM9

'You are sure that you communicate in a clear way. That they'll understand. But not surprisingly, what I think is clear and some other people think is clear, is clear as mud in Asia. It is a big, big challenge'.

GAM9

The difference between the US and the rest of the world was again highlighted in this case study as a cross-cultural issue.

'And what we find with the American companies is that they are terribly insular even when they have a global presence. There are lots of barriers to break down. As far as they are concerned, sometimes, the UK is Europe because it speaks English. [GAM9] is trying very hard to think outside the US now but I know it's one of her challenges'.

Int9.3

8.5 FURTHER ANALYSIS AND DISCUSSION OF CASE STUDY 4

The role constructs for EquipmentCo have now been presented and discussed and a few comparisons and contrasts have been made with the previous three case studies. However, as already expressed in the previous cases, it is not intended to carry out a full cross-case analysis at this point between each of the individual cases as they are presented.

Throughout the reporting of the within-case analysis of this case study, a number of observations were made about the data. Some further observations are now made here.

8.5.1 Commentary on the Data from EquipmentCo

The number of text unit comments from the respondents in the EquipmentCo case study are sufficient to present data displays by respondent group for the customer-focused role constructs, and the internal-focused role constructs. These can be found in Figures 7.6 and 7.7.

The top three customer-focused constructs by text unit count were the same as those that emerged from the CourierCo and ComputerCo case studies. In fact, they were identical to ComputerCo, giving further support to the argument that where the global account relationship is well developed, then it is likely that both customer and supplier parties will be focused on *developing new ideas and opportunities*.

As with the other case studies, there was congruence between the respondents on the top four customer-focused role constructs that emerged from the EquipmentCo data. Likewise, the same trend appeared in the internal-focused role constructs where there was much less congruence with the exception of *managing the internal team*. The further supports the suggestions explored in paragraph 5.5.1.

Three of the internal-focused constructs were not supported from the data in this case study. These were *internal consultant*, *facilitating the contract* and *finding opportunities*. The latter two of these constructs were not found in the ComputerCo

case study either. This further supports the premise that the more established the global relationship is, the less likely that the respondents express a need to *facilitate the contract*.

Figure 8.6 Customer-Focused Role Constructs by Respondent Group

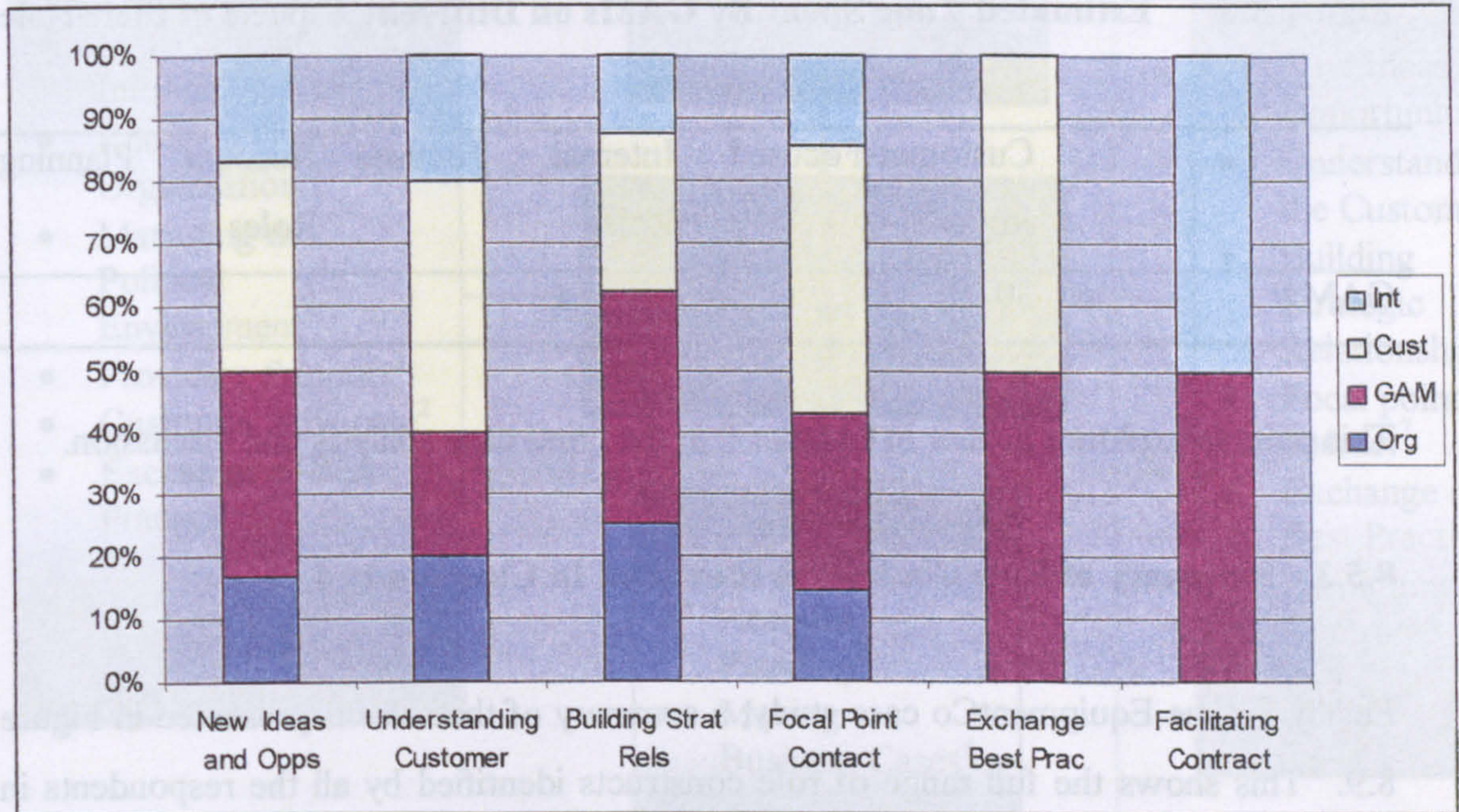
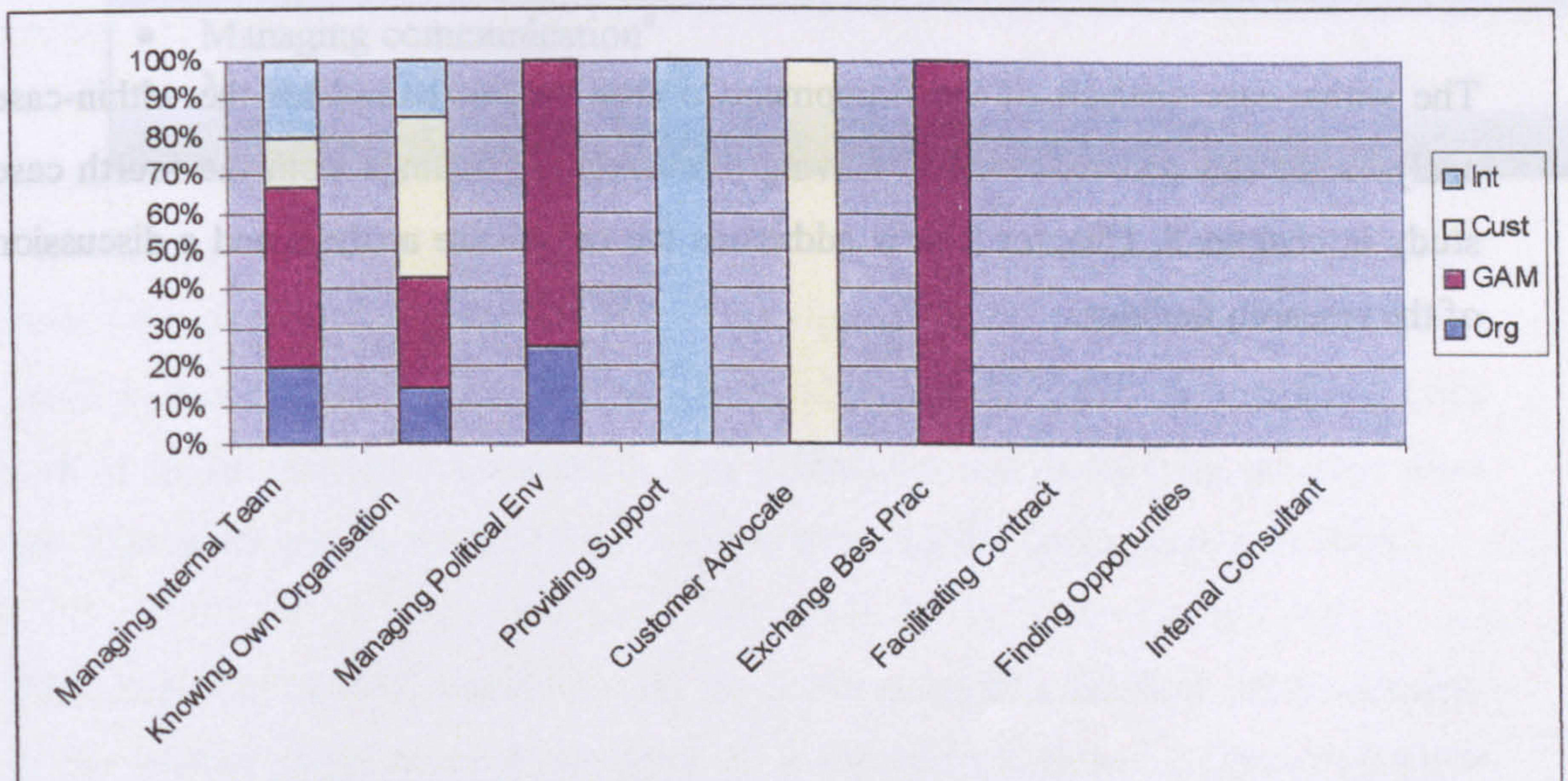


Figure 8.7 Internal-Focused Constructs by Respondent Group



8.5.2 Proportion Of Time Spent Externally And Internally

As with the previous three case studies, Figure 8.8 shows how the Account Director in the EquipmentCo case study 4 estimated her time was spent.

Figure 8.8: Estimated Time Spent By GAMs on Different Aspects of their Role

	Customer-Focused Roles	Internal Roles	Focused	Account Roles	Planning
GAM 9	30	65		5	

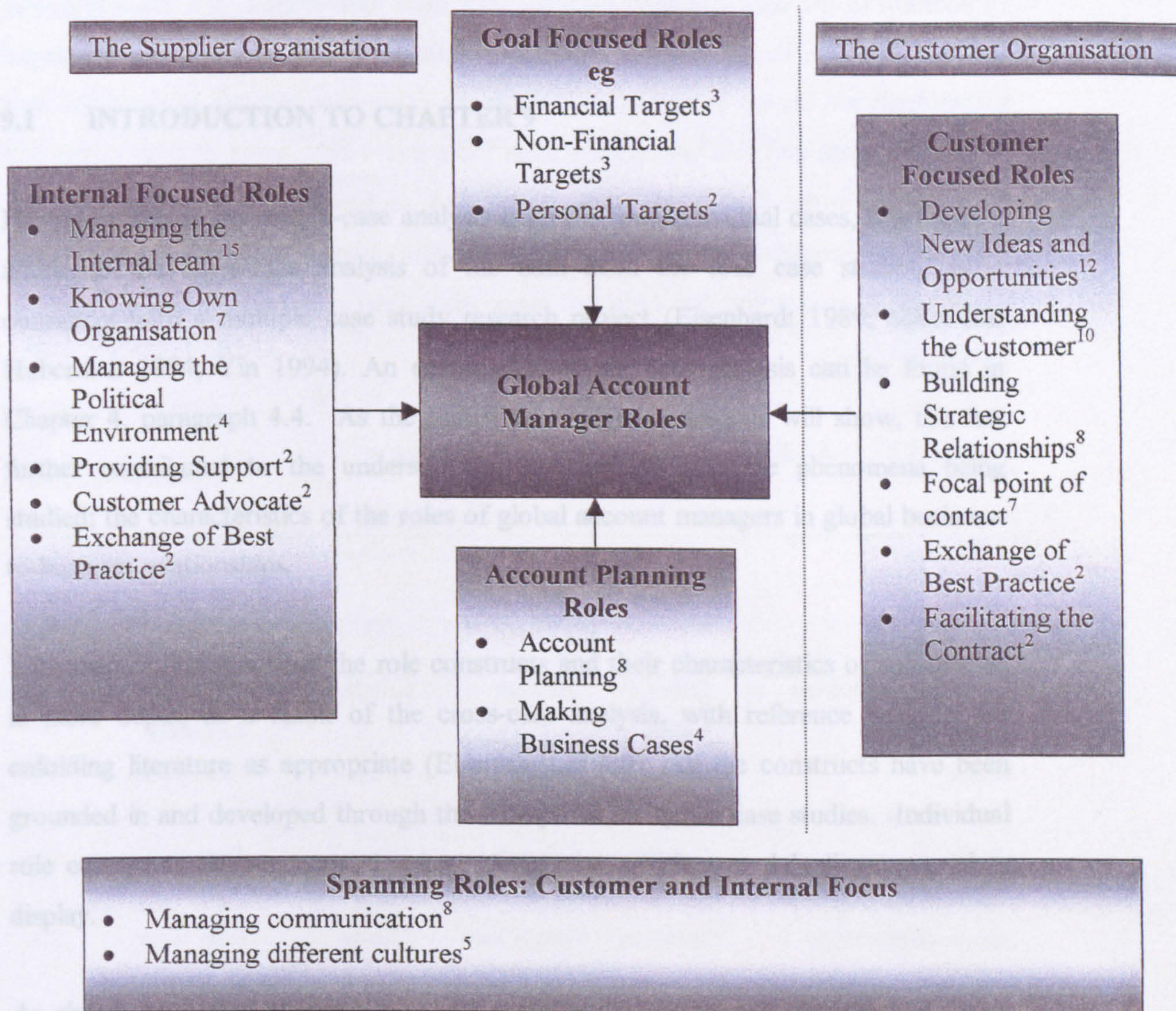
This point is explored further in Chapter 9 in the cross case analysis and discussion.

8.5.3 Summary of Role Constructs Identified In Case Study 4

Finally for the EquipmentCo case study, a summary of the roles is presented in Figure 8.9. This shows the full range of role constructs identified by all the respondents in this case study. They are presented in text unit count order with those carrying the most text units at the top of each role category.

The within-case analysis of the EquipmentCo case studies completes the within-case analyses for this research study. Having discussed the findings from the fourth case study in chapter 8, Chapter 9 now addresses the cross-case analysis and a discussion of the research findings.

Figure 8.9: Summary of Role Constructs Identified in Case Study 4.



CHAPTER 9: CROSS-CASE ANALYSIS AND DISCUSSION OF FINDINGS

9.1 INTRODUCTION TO CHAPTER 9

Having presented the within-case analysis from the four individual cases, this chapter addresses the cross-case analysis of the data from the four case studies, as is consistent with a multiple case study research project (Eisenhardt 1989; Miles and Huberman 1994; Yin 1994). An explanation of the data analysis can be found in Chapter 4, paragraph 4.4. As the following cross-case analysis will show, this has further contributed to the understanding and insights into the phenomena being studied; the characteristics of the roles of global account managers in global business-to-business relationships.

This chapter first describes the role constructs and their characteristics or sub-themes in more depth, as a result of the cross-case analysis, with reference back to the unfolding literature as appropriate (Eisenhardt, 1989). All the constructs have been grounded in and developed through the data provided by the case studies. Individual role constructs are represented, where appropriate, with a model, diagram or data display.

As already explained in paragraph 4.1.1, with a retroductive research strategy within the realism paradigm, you may be both theory testing and theory building. From the cross-case data analysis, it is evident that the findings both confirm and support previous conceptual and empirical research whilst also building theory in the specific area of global account management. Key differences and similarities between cases and respondent groups are also discussed and some further findings are presented.

The cross-case analysis concludes with the presentation of a finalised validated model of the roles of global account managers, as is consistent with realist research (Blaikie 1993). Finally, there is an exploration of some of the additional findings described by Eisenhardt (1989) as *serendipitous* findings.

9.2 ADDITIONAL ORGANISATION RESPONDENTS

In addition to the data collected from the four main case studies, this discussion also includes the data from the other interviews outlined in Chapter 4. The additional respondents are shown in Figure 9.1. While the cross-case analysis of the roles does not include data and text unit counts from these interviews, some of their comments are included in the discussion where appropriate, as further illustration and support. ConsultancyCo and AutomotiveGlassCo had both been running a global account management programme for over five years while GasCo has been running theirs for about two years.

Figure 9.1 Additional Organisation Respondents

Additional Organisation Respondents						
Type of Interview by Respondent	Interview Location	Medium	Length	Recording of Interview	of	Transcribed
GasCo Organisation Interview 6	Australia	Telephone	1 hour	Field Notes		No
GasCo Organisation Interview 7	Canada	Telephone	1 hour	Tape		Yes
AutomotiveGlassCo Organisation Interview 8	St Helens	Face to Face	2 hours	Field Notes		No
ConsultancyCo Organisation Interviews 9	London	Face to Face	2 hours	Tape		Yes
Total: 4	3	2 face to face	6 hours	2 Tape		2 Yes
	countries	2 telephone		2 Field Notes		2 No

All the respondents were senior managers in their organisations. For example, the Global Account Director at ConsultancyCo was at senior partner level in the organisation.

The attribute data for these additional respondents is shown in Figure 9.2.

Figure 9.2 Additional Organisation Respondent Profiles: Attribute Data

Additional Organisation Respondents						
Respondent Type	Work Location	Nationality	Gender	Job Title	Time in Current Job	Age
Organisation Interview 6 <i>Org6</i>	Australia	Australian	Male	Regional Director	2 years	X
Organisation Interview 7 <i>Org7</i>	Canada	Canadian	Male	Director Globals	3 years	X
Organisation Interview 8 <i>Org8</i>	UK	American	Male	Corporate Director	1 year	X
Organisation Interview 9 <i>Org9</i>	UK	British	Male	Global Account Director	1 year	X
Total: 4	3 countries	3 nationalities	4 Male			

9.3 INTRODUCTION TO THE CROSS-CASE ANALYSIS

The cross-case analysis involves all the data from all the respondent interviews from the four case studies presented in Chapters 5-8. The design of the data analysis and the coding structure on the NVivo data analysis programme allowed for reports from the data to be displayed in a number of ways. For example, constructs by case and respondent have been presented in the within-case analysis. It is also possible to report and present the construct data from across the cases in a similar way. This lends support to the validity of the findings in terms of the ability to triangulate the data. For example, there are constructs, which are not only supported by every case but are also supported by every respondent group.

Table 9.1 shows the data display of the total text unit count for each role construct and also the overall text unit count for each case study for each construct. As discussed in previous chapters, while the text counts cannot be construed as quantitative data, they do serve to weight and order the constructs in a helpful manner. The data can also be displayed for each respondent group. This is shown in Table 9.2.

From the within-case data analyses, sub-themes were developed for some of the constructs and these were presented by data displays at the point of discussion. While, the main cross-case analysis has been left to this chapter, some initial comparisons and contrasts were also discussed at the end of each case study chapter. These will be developed further as appropriate.

In the first part of the cross-case research, the constructs are revisited and discussed on a cross-case basis with reference to both the evidence and findings from across the cases and from across the respondent groups. The sub-themes are further developed and data displays from the cross-case analysis are presented as tables, models and diagrams, where they are thought to be appropriate in further synthesising and explaining the findings, and also in the interests of data reduction.

Table 9.1 Global Account Manager Role Constructs By Case

Role Construct	Text	Case Study			
	Unit	Courier	Comput	Compont	Equip
	Count	1	2	3	4
Goal Focused	56	11	17	19	9
Financial	24	5	7	9	3
Personal	16	3	5	5	3
Non-Financial	16	3	5	5	3
Customer Focused	312	95	86	90	41
Developing New Ideas and Opps	79	20	31	15	12
Understanding the Customer	79	25	21	23	10
Building Strategic Relationships	60	21	17	15	8
Focal Point of Contact	41	12	12	10	7
Facilitating the Contract	32	9	0	21	2
Exchange of Best Practice	21	8	5	6	2
Internal Focused	267	98	71	67	31
Managing Internal Team	120	43	35	27	15
Knowing Own Organisation	31	8	10	6	7
Customer Advocate	26	10	7	7	2
Providing Support	21	7	7	5	2
Managing Political Environment	19	5	5	5	4
Exchange Best Practice Internally	19	10	4	4	1
Facilitating Contract	16	6	0	10	0
Internal Consultant	8	4	3	1	0
Finding Opportunities	7	5	0	2	0
Account Planning Focused	54	12	16	14	12
Account Planning	38	8	12	10	8
Making Business Cases	16	4	4	4	4
Spanning Focused	154	44	37	60	13
Managing Communication	91	29	21	33	8
Managing Culture	63	15	16	27	5
Total	843	260	227	250	106

Table 9.2 Global Account Manager Role Constructs by Respondent Group

Role Construct	Text	Unit	Respondent Group			
	Count		Org	GAM	Cust	Int
Goal Focused	56		8	44	1	3
Financial	24		5	15	1	3
Personal	16		0	16	0	0
Non-Financial	16		3	13	0	0
Customer Focused	312		31	108	96	77
Developing New Ideas and Opportunities	79		8	30	23	18
Understanding the Customer	79		9	25	20	25
Building Strategic Relationships	60		7	23	17	13
Focal Point of Contact	41		1	9	17	14
Facilitating the Contract	32		6	11	11	4
Exchange of Best Practice	21		0	10	8	3
Internal Focused	267		29	104	58	76
Managing Internal Team	120		17	57	18	28
Knowing Own Organisation	31		4	8	13	6
Customer Advocate	26		0	5	21	0
Providing Support	21		0	0	0	21
Managing Political Environment	19		5	12	0	2
Exchange Best Practice Internally	19		1	8	0	10
Facilitating Contract	16		2	6	6	2
Internal Consultant	8		0	8	0	0
Finding Opportunities	7		0	0	0	7
Account Planning Focused	54		10	31	5	8
Account Planning & Forecasting	38		7	22	1	8
Making Business Cases	16		3	9	4	0
Spanning Focused	154		19	56	38	41
Managing Communication	91		8	31	24	28
Managing Culture	63		11	25	14	13
Total	843		97	343	198	205

The constructs are now presented and discussed in the following order:

- 9.4 Goal-focused role constructs
- 9.5 Customer-focused role constructs
- 9.6 Internal-focused role constructs
- 9.7 Account Planning-focused role constructs
- 9.8 Spanning-focused role constructs

It needs to be recognised throughout the cross-case analysis that Case Study 4 had only five respondents compared to the other case studies, which had eleven (CourierCo and ComputerCo) or twelve (ComponentsCo).

9.4 CROSS-CASE ANALYSIS OF THE GOAL-FOCUSED ROLES

The goal-focused role constructs were supported by comments from all the case studies. There were 56 text unit counts across the case studies for this construct. There were, however, some differences between the different respondent groups. This was a construct that was expressed almost exclusively by the Organisation and GAM respondents. This was not thought to be unusual, as in the background information gained from the organisation respondents, goals that the GAMs needed to achieve were partly cascaded from each organisation's overall business objectives, and partly set against what needed to be achieved for the customer. While two of the respondents indicated that in the future they would like to see some of the formal goals and objectives for the relationship set jointly with the customer, this had not yet happened in practice.

So, even at the global account level of customer management, most of the formal financial and non-financial goals were still set by the supplying organisation. This wasn't to say, however, that some of these goals were not set in response to, for example, a joint project with the customer, but rather that the customer did not have input into setting the goals and objectives, or any involvement in signing them off. What did emerge from the organisation interviews with CourierCo and ComputerCo, was that the measurement of achievement of some of the goals, did have customer input. Parts of the compensation packages were related to a customer assessment, of how well the GAM had performed in their role from the customer's perspective. For example, in ComputerCo's case, this related to 15% of the GADs total remuneration.

One of the GasCo respondents said that as well as the usual budget goals, the GAMs in GasCo had five goals each year that had to make a difference for the customer, which could either be short-term or long-term. These could be anything from the introduction of a new product, formulating a long-term contractual arrangement on service, or it could be an EDI or an e-commerce development. The GAMs were actively encouraged to build a long-term perspective into their objective setting.

A typology of goal roles emerged from across the within-case analyses, that was supported by all the case studies. This is reproduced at Figure 9.3. This typology

shows three core sub-themes of *financial* goals, *non-financial* goals and *personal* goals as a sub-theme. These sub-themes were found in all four of the case studies. The personal goals were informal in that they were not formal objectives that the GAMs had to achieve as part of the way they were assessed which added a second dimension. Unlike the formal goals, the personal goals were often related to things that the GAM wanted to achieve with and for the customer.

Figure 9.3 Cross-Case Typology of Global Account Manager Goal Roles

Goal Type	Formal/Informal	Strategic/Operational	Short/Long Term
Financial	Formal	Strategic/Operational	Short/Long
Non-financial	Formal	Strategic/Operational	Short/Long
Personal	Informal	Strategic/Operational	Short/Long

The third dimension of the goal roles that emerged from all four case studies was that the goals were a mixture of short-term goals and longer-term goals. Finally, a fourth dimension to emerge from the cross-case analysis was that some of the goals were related to strategic customer goals and some were related to operational customer goals. This was particularly the case with the non-financial and personal goals.

Focusing on the financial goals was very much the Organisation respondent's view of the GAM's goal-focused roles. This was expressed in terms such as, being *the primary focus and their main goal* with another respondent saying that the role was *absolutely about growth*. It was also about having *responsibility to grow the business* and in some cases to take on *P&L responsibility* for the customer. Taking the P&L responsibility for the global customers was suggested by Millman (1996), as one of the GAM roles/responsibilities. This view is supported by what the respondents said in this research but at the time of the interviews none of the GAMs had taken on full P&L responsibility. Subsequently, CourierCo, following a change in their structure, did give the top fifteen NGAMs full accountability for profit and loss. In contrast to the Organisation respondents, the GAMs expressed their goal-focused roles far more

in terms of *achieving* or *meeting* the financial targets. Some also described them as their *key performance indicators* or *KPIs*, particularly in relation to their non-financial goals. However, the GAMs also talked far more about the non-financial and personal goals.

The goals are important as a role construct because they set the focus for the GAMs in terms of carrying out their overall role. This was evident from such comments as:

'The way the objectives and rewards are structured will drive their behaviour and their focus. In the past this has been far too much focused on the short-term.'

Org1

Having discussed the goal-focused role constructs, the customer-focused role constructs are now explored.

9.5 CROSS-CASE ANALYSIS OF CUSTOMER-FOCUSED ROLES

Six major customer-focused role constructs emerged from the within-case analyses. In total, across the case studies, there were 312 text units counts for the customer-focused roles. The text unit counts from the three larger case studies were broadly similar, with the fourth case study proportionately showing a similar emphasis. The role constructs that emerged from the cross-case analysis are now presented and discussed.

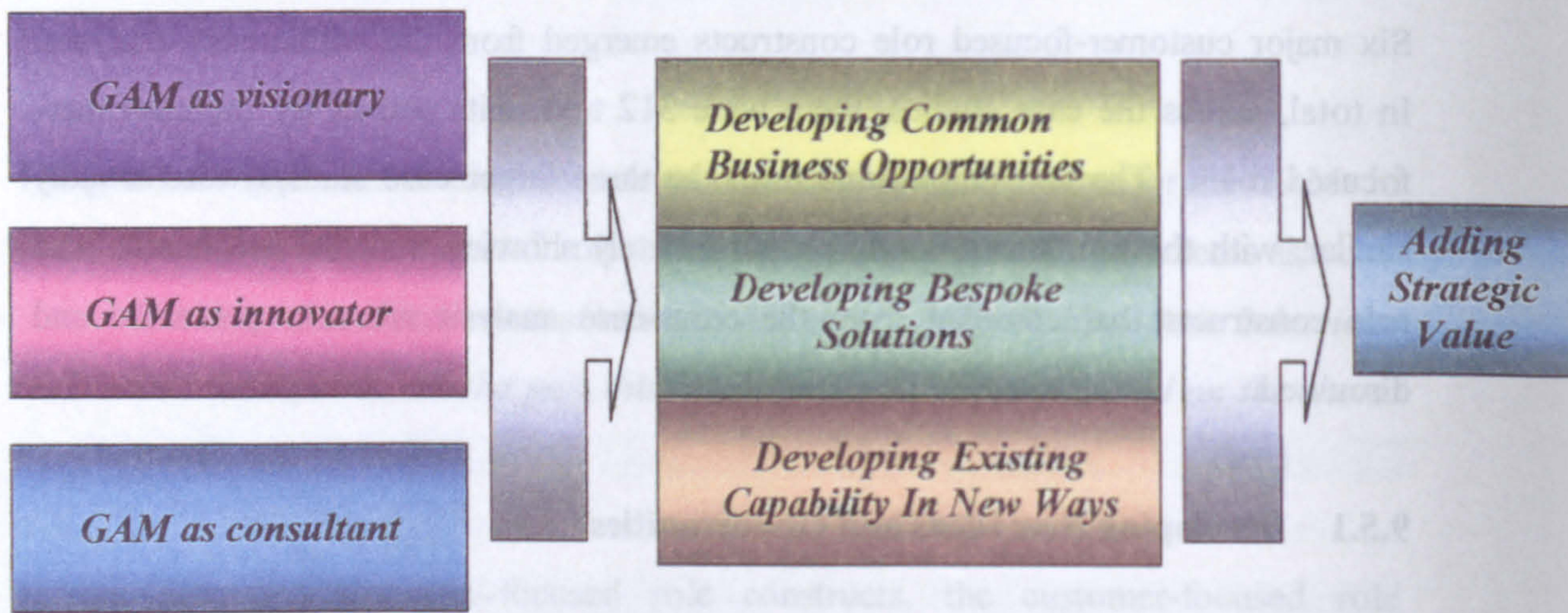
9.5.1 Developing New Ideas and Opportunities

Developing new ideas and opportunities was the most mentioned customer-focused role construct (79 text units) along with *understanding the customer* across all four cases. It was also strongly supported as a construct across all four respondent groups. It was mentioned by every single respondent in the ComputerCo case study. This aspect of the role is not explicitly discussed in any of the earlier literature. However, Millman and Wilson (2000), when suggesting that the role of the GAM is that of the *political entrepreneur* describe part of the entrepreneurial role as: '*Seeks business opportunities and perceives synergistic potentials of value to buyer, seller and self*'. The empirical findings do support this aspect of Millman and Wilson's conceptual role.

There were a number of sub-themes to this role that have been developed into the model, which is displayed in Figure 9.4. Some further explanations of the model are now discussed:

The GAM as visionary: this was described as *being a visionary*. It was also to do with keeping the customer *one step ahead of the game*. It was also about *being a catalyst*: this was expressed as *moving things forward* for both the customer's organisation, not simply delivering the service. It was also expressed as *being like a crusader*. It was also about being *proactive*.

Figure 9.4 Model of the Sub-Themes for the *Developing New Ideas and Opportunities* Construct



The GAM as innovator: this is linked with the GAM as visionary sub-theme. However, it is possible to be innovative without being a visionary. This sub-theme was obviously about the GAM being *innovative*, both with existing capability, and about new ideas and opportunities. It was also about *being creative*.

The GAM as consultant: A number of the GAMs explicitly referred to themselves in this role, as *acting as a consultant or being like a customer consultant* and even being like an *unpaid consultant* to the customer in the GAM role. In this role they saw themselves as *identifying and developing new solutions, floating ideas, researching ideas and building proposals* and in terms of *building business propositions*.

The idea of the salesman with responsibility for managing a long-term relationship being like a *consultant to the customer* is described by Corcoran et al (1995) as being one of the three roles of *consultative selling*. He describes the role as being like a *business consultant*. The characteristics he describes for this role are broadly similar to some of the sub-themes described by the case respondents. The characteristics can be found in paragraph 2.2 of the literature review. Millman and Wilson (1995) suggest that *consultant* is a

role for the Key Account Manager although they don't specify what activity this is related to or whether this is being a consultant in terms of the customer or their own organisation. The respondents in this study have clearly articulated a consultant role for the GAM. This role, to date, is not referred to at all in the global account management literature.

Developing bespoke solutions: this was described in terms of *seeking out* new opportunities that were *unique* to the customer. It was also about *leveraging* the supplier's *core capability* to provide customer-specific solutions.

Developing common business opportunities: this was described as looking to *create common opportunities* that *added value* for both organisations.

Developing existing capability in new ways: this was about looking at *existing capability* and seeing how this could be applied in the customer's organisation if it hadn't been already. It was also about extending existing capability in different and new ways.

Adding strategic value: customers, in particular, stressed that what they were looking for in terms of where the GAM role added value for them, was in bringing together the ideas and opportunities with the customer that were of *strategic value*.

The model suggests that the key activities of the GAM being *visionary*, *innovative* and *acting as a consultant* need to be applied to three different areas of developing new ideas and opportunities. These are *developing common business opportunities*, *developing bespoke solutions* and *developing existing capability in new ways*. Ultimately, it is in these three areas that the customer comments suggested that the GAM added strategic value for the customer organisations.

One final aspect to emerge from the cross-case analysis was that this construct is likely to be more important and strategic in those cases where the global customer relationship had been established for a period of time. For example, where the global relationships had been established for three years or more (as seen in some of the

relationships from case studies 1, 2 and 4), then this was a far more important construct than for the ComponentsCo respondents, whose global relationships had only been formally established for a year. This point was also discussed in paragraph 7.5.1. What also emerged from the cross-case analysis is that this is a strategic customer role. This is supported partly by the weight given to the construct by those with longer-established relationships and partly as evidenced by the comments from the respondents reported in the within-case analyses.

9.5.2 Understanding the customer

This was again a role identified in all four case studies and by all four respondent groups (79 text units). This construct is suggested in the practitioner literature on the *consultative salesperson*. Corcoran et al (1995) suggest the *consultative salesperson* should use *internal and external resources to gain an understanding of the customer's business and marketplace*. This research supports the suggestion that the GAM needs to have an in-depth understanding of the customer but also extends the Corcoran description in terms of the depth of understanding that is required. *'They must be the ones with the absolute understanding of the customer.....this is easy to say but extremely difficult in practice (Org8)'*. The Corcoran description suggests a rather superficial approach to understanding the customer. The sub-themes underpinning this construct suggest that *understanding the customer* is a complex and multi-faceted construct.

For example, comments from the respondents across the case studies suggested a number of sub-themes, which are shown in the data display in Figure 9.5, building on the data display in Figure 6.6.

Identifying and understanding key people and politics: this was about knowing all *the key people involved* in the relationship in the customer's organisation. It was not just about knowing who they were in terms of their *position* and *job responsibility*, but also *'knowing what makes them tick'*. This was expressed as needing to understand what a key contact in the organisation wanted to achieve in terms of meeting:

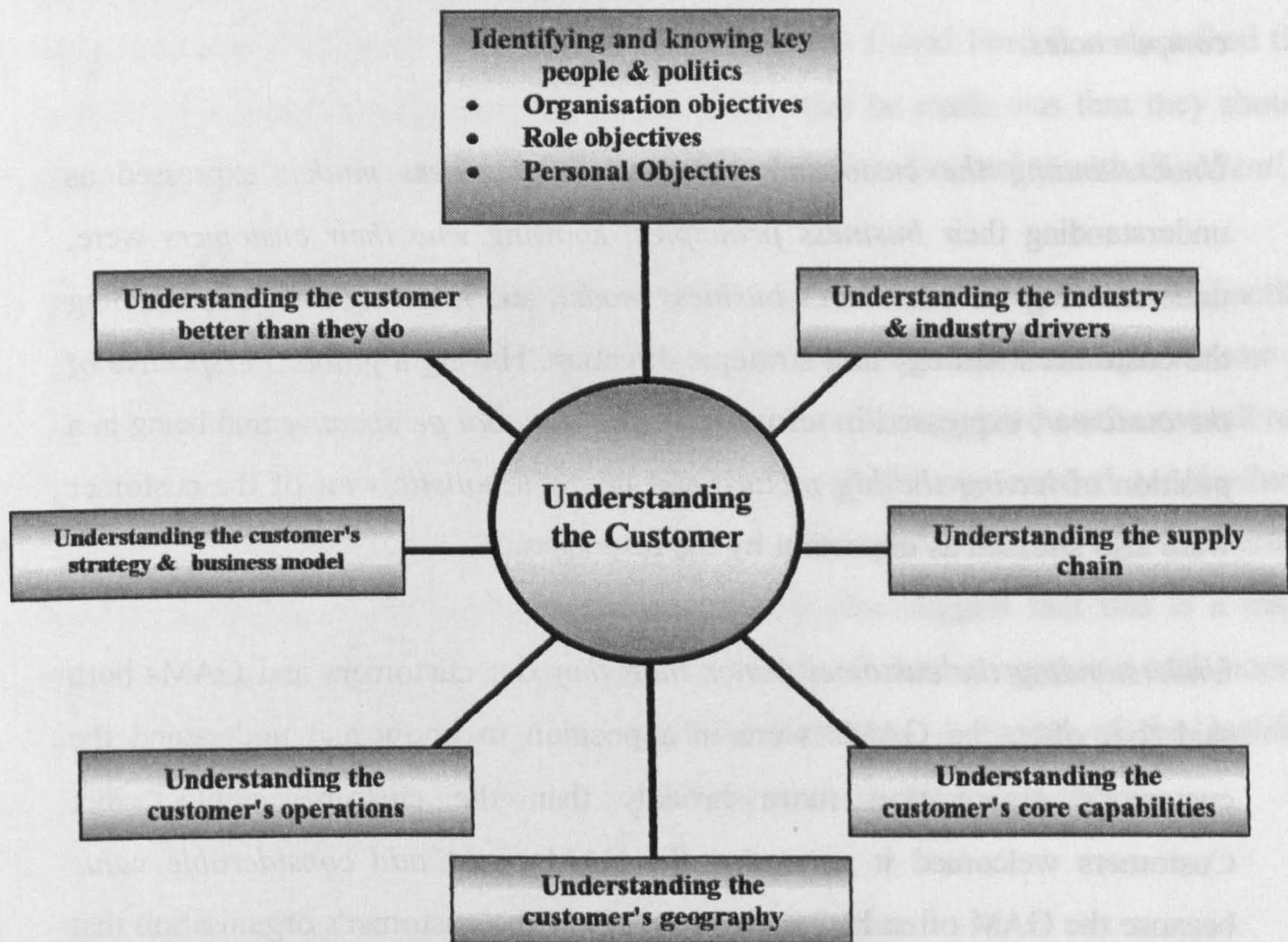
- *Their organisational objectives*

- *Their particular role/job objectives*
- *Their own personal agenda*

Understanding the politics of the customer's organisation and the individual contacts was also mentioned. Another aspect of this sub-theme was understanding the *decision-making structure*

Understanding the customer's geography: this was expressed in its simplest terms as *knowing all the countries* the customer was operating in, and the relationships between them. However, it was also expressed in terms of having a knowledge of *political situations* and how to *handle business in different parts of the world*.

Figure 9.5 Understanding the Customer Sub-Themes



Understanding the industry and industry drivers: this was expressed as not just having an *in-depth knowledge of the industry*, which was seen to be very important by a number of the respondents, but also to have a knowledge of *competitors, emerging technologies, political pressures and changes going on in the industry*. Identifying and understanding the customer's key industry drivers was also seen as a requirement.

Understanding the supply chain: GAMs needed to know and understand the customer's supply chain.

Understanding the customer's core capabilities: expressed as knowing and being able to *leverage* the capabilities of the customer, and in order to understand and identify how the supplier's organisation could *match and enhance the customer's capabilities*. *Capabilities* were also described as *core competencies*.

Understanding the customer's strategy and business model: expressed as understanding their *business principles, knowing who their customers* were, understanding the customer's *business model*, and knowing and understanding the customer's strategy and strategic direction. Having a *global Perspective of the customer*, expressed in terms of *having a global perspective* and being in a position of *having the big picture* and taking a *holistic view* of the customer were also stressed as important by the respondents.

Understanding the customer better than they do: customers and GAMs both said that often the GAMs were in a position to know and understand the customer's organisation more broadly than the customer contact did. Customers welcomed it as a way the GAM could *add considerable value* because the GAM often had access to parts of the customer's organisation that the customer contact didn't have. Another comment was that the GAM should almost be thinking *they are employed by the customer*. This was expressed by a GAM as a way of making sure that the understanding of the

customer went deep enough. Customer's also talked of the need for GAMs to *put themselves in their shoes*.

Understanding the customer's operations: this was expressed by the respondents as *knowing the customer's operations and services in-depth*. This was particularly important because if the GAM did not understand these sufficiently, then they would not be in a position to see where there were possibilities for developing the business. In other words the GAM needed to understand this before they could be effective in their role of *developing new ideas and opportunities*.

9.5.3 Building Strategic Relationships

Building strategic relationships was seen across all four case studies as being a significant part of the role (60 text units). Aspects of this construct have also been suggested in the literature. As far back as 1980 when David Ford first described the role of a *relationship manager*, one of the points that he made was that they should take responsibility for *'the successful development of the relationship with the client'*.

Corcoran et al (1995) have described this in terms of building *co-operation* and acting *as a business partner*. Millman (1999b) also lists *relationship builder/facilitator* as one of his suggested 8 GAM roles. This was also a role suggested as the overall role for Key Account Managers (Millman and Wilson 1995) who needed to *'facilitate multi-level, multi-function exchange processes'*. The models for the dyadic interface (see 2.3.3) and for relational development (2.3.2) also suggest that this is a major aspect of the overall GAM role. Again, this research further supports and extends these suggestions and models with empirical findings. A model of the *building strategic relationships* construct and its sub-themes is shown in Figure 9.6.

Sub-themes of this role expressed by respondents include:

Building multi-level relationships: this was expressed as building relationships with *different levels of people* in the customer's organisation. It was very much that the GAM's role was to build relationships at the senior levels of the

customer's organisation. GAMS also needed to *facilitate multi-level relationships*. This was described as *facilitating* relationships between different levels of people in each organisation. This was from the top where they needed to facilitate *getting our Board, speaking to their Board*, down to the day to day operational relationships necessary to manage the business. There was also a role for them in *encouraging executive sponsorship*.

Building multi-functional relationships: this was described as the requirement to build *multi-functional* relationships within the customer's organisation. This was tied in with the facilitation point above, as internal team members saw this as the GAM's role to build the relationship and then to facilitate the internal team member in building their own relationship. It was then a question of the GAM *letting go* at this point.

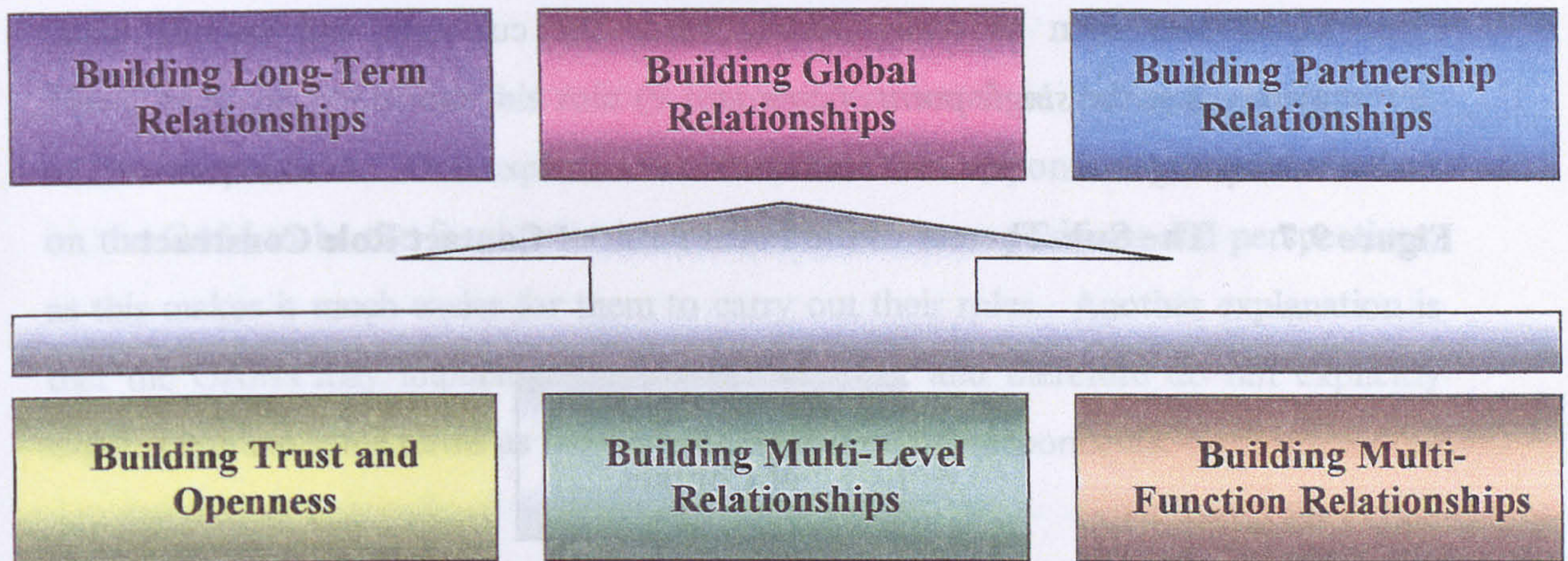
Building global relationships: the GAMs were seen as being in a position to build the customer/supplier relationship at the global level and to facilitate global relationships between other people in both organisations. In order to do this they needed to be good at the previous two sub-themes.

Building long-term relationships: this was seen as a key sub-theme of the relationship building role with the customer. In the more developed case relationships it was described as the GAM *setting the strategy for the account* and *building the relationship at that level*. It was also to do with the GAM *taking the longer term view* of the relationship, and developing the *senior level relationships where good relationships did not currently exist*. They had the *high level* contacts. The strategic nature of the relationship building for global account relationships has been little discussed in the literature.

Building trust and openness: *building trust and openness* was seen as a requirement by the respondents, but it was also one which took time to build. Respondents also talked about becoming *personal friends* where the relationship with key contacts was extremely close. Phrases like *being married* and *being in a marriage* were also used to describe the type of relationship that needed to exist.

Building a partnership relationship: a number of the respondents talked about *building a partnership relationship based on trust and openness*. For example, Org6 stressed that the GAMs *'must build strategic partnerships'*.

Figure 9.6 A Model of the Building Strategic Relationships Construct



In representing the sub-themes in Figure 9.6, it is suggested that the achievement by the GAM of the top three sub-themes, is in part reliant on the GAM first achieving the bottom three sub-themes. It is unlikely that the GAM can build long-term, global and partnership relationships, if the openness and trust is not evident and if the key relationships at different levels of the customer's organisation and in the different functions have not been sufficiently built and strengthened. If the GAM's only contact, as is the case with, for example, the *exploratory KAM* stage, their purchasing counterpart, then it is unlikely that this could be described as a *strategic relationship*. For global account management, it is suggested that without the multi-level, multi-function relations between customer and supplier, then it is also unlikely that a global relationship could actually exist.

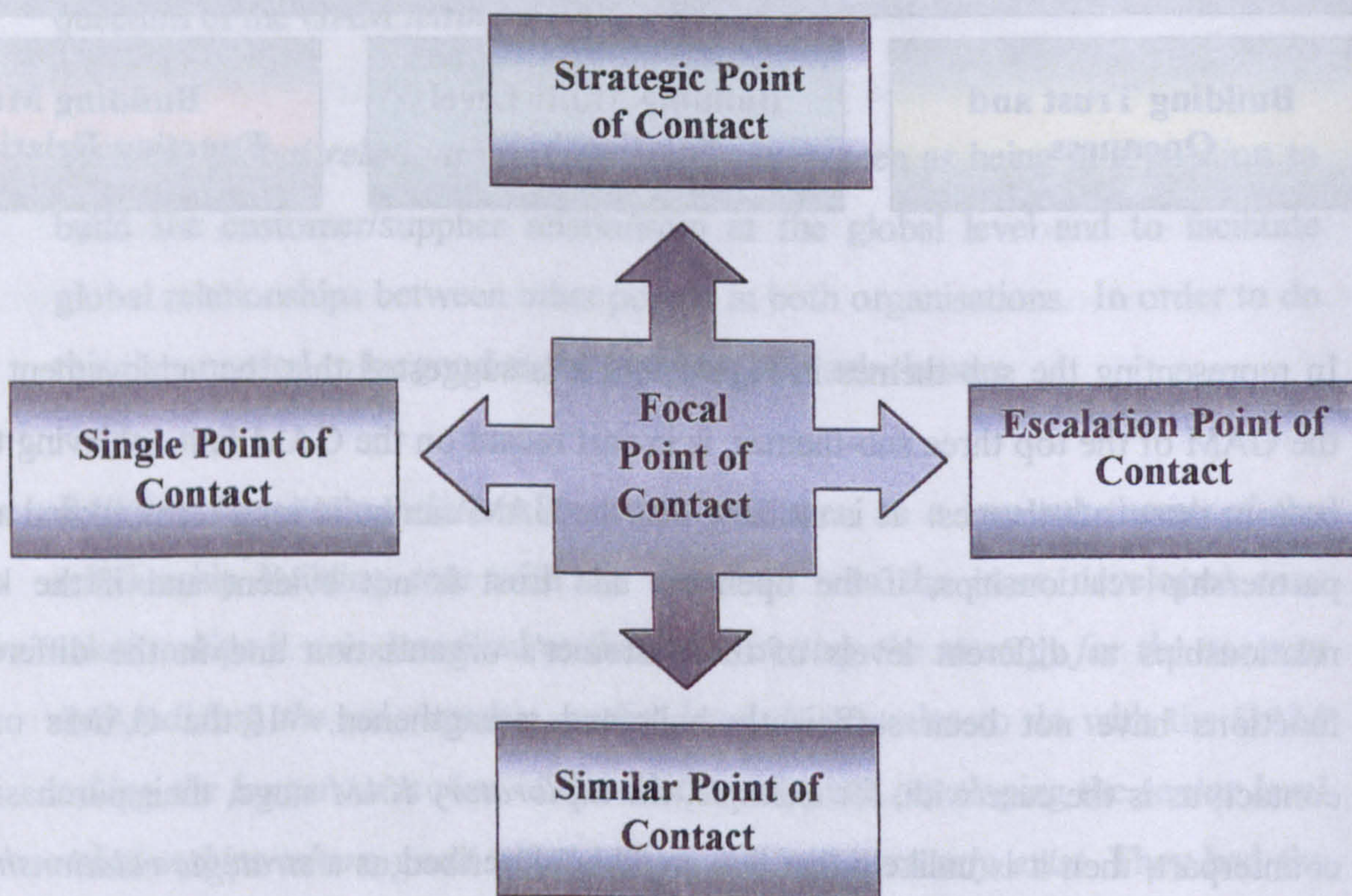
9.5.4 Focal Point of Contact

The role construct was identified in all four case studies (41 text units). This was, however, one which the customers (17 text units) and internal respondents (14 text units) mentioned more in terms of text counts. Customer respondents across all four

cases saw this as a fundamental role for them. This role goes right back in the literature when David Ford (1980) suggested that there was a role for a *relationship manager* who was the main *contact man* for the client company. The sub-themes that emerged from the cross-case analysis of this role construct are shown in Figure 9.7.

Single point of contact: customers expressed that they wanted a *main* or *focal* point of contact and this was *particularly* important in a *global context*. The GAM was seen as really *adding value* for customer and internal team members as the *single point of contact*.

Figure 9.7 The Sub-Themes of the Focal Point of Contact Role Construct



Similar point of contact: this was an interesting point that emerged in terms of the customer looking for a *similar* point of contact that they felt comfortable with.

Strategic point of contact: it was recognised that while it was essential to have a *focal* point of contact for the relationship that was the GAM, that they couldn't be the main contact at all levels of operation in a global relationship

as it was not physically possible. Therefore what they needed to be was expressed as the *strategic point of contact*.

Escalation point of contact: this was linked with being the strategic point of contact in terms of the GAM not being the focal point of contact for all levels of the global relationship, but that there was a role for the GAM in being an *escalation vehicle* for problem solving when necessary.

The GAMs did not stress this role (9 text units) as much as the customers and the internal respondents. One explanation is that these two respondent groups are reliant on the GAM to be the focal point in relation to their own positions and perspectives, as this makes it much easier for them to carry out their roles. Another explanation is that the GAMs may implicitly see this as their role, and therefore do not explicitly express it in the same terms as the customers and internal respondents.

9.5.5 Facilitating the Contract

This role construct (32 text units) has not been discussed in the literature. This was the point that just having a global contract or agreement does not mean that everyone in both organisations is signed up to it. A requirement was identified by the respondents, particularly in case 3, that there was a significant role for the GAM in getting the local level people in the customer's organisation to know, understand and use the global agreement. This was expressed by the respondents as *bringing the contract to life* and *getting buy-in to the contract* in the customer's organisation. This role was also about *the strategic negotiation* of the global agreement or contract. The key sub-themes were:

- Strategic negotiation of the global agreement
- Getting buy-in to the global agreement (at all levels in the customer)
 - Hard Issues: operation, service delivery
 - Soft Issues: getting people on board, building trust etc
- Marketing the agreement (in the customer organisation)

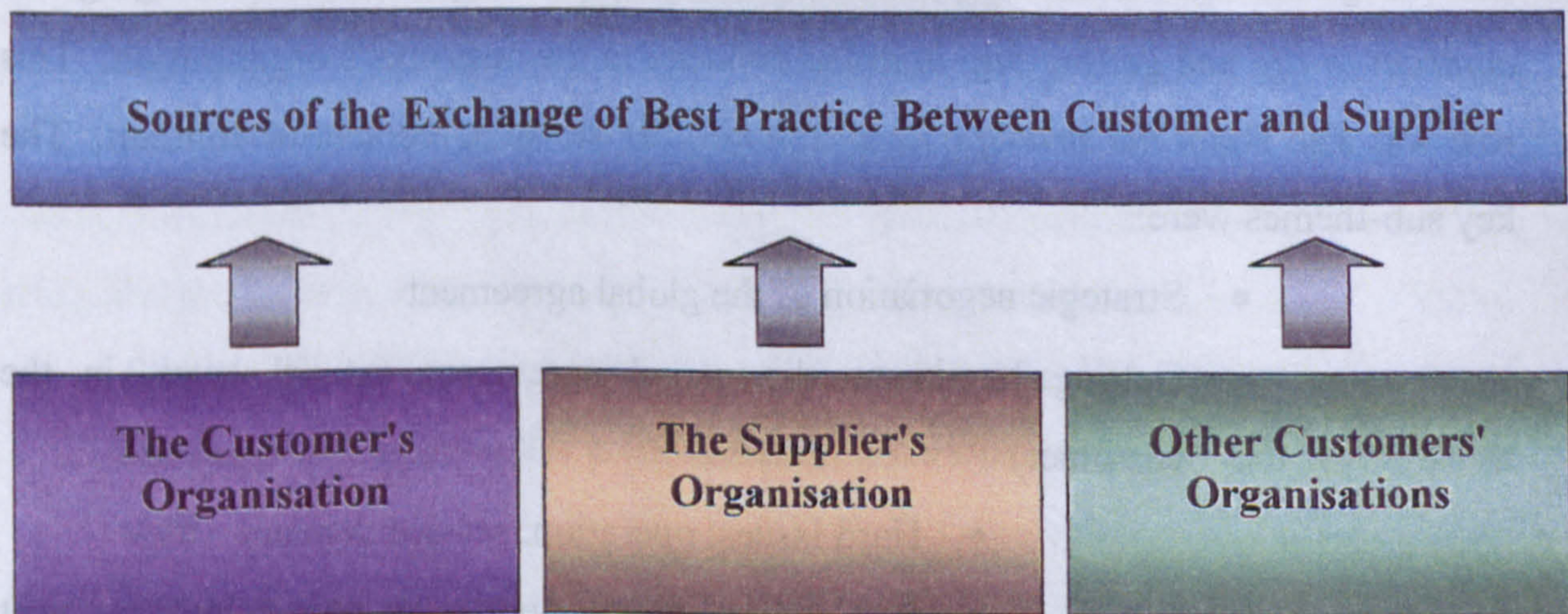
This point was further discussed in paragraph 7.5.1 where it was suggested that this was a more important role construct where the global relationship was at the early stages of development, as was the case with the ComponentsCo global relationships.

9.5.6 Managing the Exchange of Best Practice

This was something that GAMs (10 text units) and the customers (8 text units) saw as a role for the GAM. Millman and Wilson (2000) also describe a possible role for the GAM in '*identifying/transferring expertise and exploiting opportunities*'. This empirical research supports their suggestion. Respondents expressed the view that this was about the GAM looking for opportunities to *exchange best practice* from both organisations and to look for opportunities for *inter-organisational learning*.

Three key sub-themes or characteristics about this role that emerged from the analysis, were where the best practice could be found, namely *from the supplier's organisation, from the customer's organisation and from other customer's organisations*. These are represented in Figure 9.8. It was recognised that the GAM was in a *unique position to pick up on* best practice in all three areas, and to offer it to the customer organisation where appropriate.

Figure 9.8 Sources of Best Practice



9.5.7 Summary of the Cross-Case Analysis of the Customer-Focused Role Constructs

The cross-case analysis of the customer-focused role constructs has now been presented and discussed. There is a great deal of congruence and support for the first three of the constructs presented. This is both across the case studies and from across the four respondent groups. There is also broad support from the case studies for the other three constructs. Where there are differences between the case studies, as with the *facilitating the contract* construct, an explanation as to why this is occurring has been offered. Where there are differences between the respondent groups, as with the *focal point of contact* construct an explanation has also been suggested. Data displays and models for five of the constructs have also been presented, supported by explanatory text as appropriate.

Having discussed the customer-focused role constructs that emerged from the cross-case analysis, the internal-focused role constructs are now explored.

9.6 CROSS-CASE ANALYSIS OF INTERNAL-FOCUSED ROLES

Nine internal-focused role constructs emerged from the within-case analyses. In total, across the case studies, there were 267 text unit counts for the internal-focused roles. Case studies 2, 3 and 4 were broadly similar in terms of the emphasis and the weight they placed on these roles overall. Case study 1, however, had a proportionately higher emphasis on these roles and was the only case study to have more comments on the internal-focused roles than the customer-focused roles.

One possible explanation for this, is that as CourierCo had highly developed systems and processes for global account management, and had been managing global accounts for a longer period than case studies 2 and 3, that they were very aware that the internal part of the GAM's role was significant. The significance of the internal part of the GAM's role is a key finding from the cross-case analysis and is discussed later in this Chapter in paragraph 9.9.1.

While the customer-focused role constructs showed a great deal of congruence across the case studies and respondent groups, the case was not the same with the data that emerged for the internal-focused role constructs, with the exception of *managing the internal team* and *knowing own organisation*. The key differences were not so much across the cases but across the respondent groups. One explanation, that would further suggest and support comments already made above, is that the internal-focused roles are less well defined and articulated than the customer-focused roles. This could be due to the fact that historically sales roles are described in terms of purely customer-focused activities. The researcher will argue later in this Chapter, based on evidence from all four case studies, that the GAM role is fundamentally a different role from sales.

A further explanation is also suggested by the cross-case analysis. This is that the different respondent groups take a far more individual focus and perspective to some of the internal role constructs, such as *providing support* and *customer advocate* than they did for the customer role constructs. However, there was congruence from across

the respondents within each respondent group on these two constructs, in particular, which suggests that the roles have consequence.

The role constructs as they emerged from the cross-case analysis are now presented and discussed.

9.6.1 Managing the Internal Team

Managing the internal team was the major internal-focused role construct identified by all four groups of respondents across all four cases (120 text unit counts). It was also the role construct that overall had the most comments from the respondents. The comment above about CourierCo is further supported here by the fact that CourierCo was the case study which had the most comments on this role construct. Looking in more detail at the respondent groups, this was the most mentioned construct by the GAMs (57 text units) and surprisingly, the most mentioned construct (along with *managing communication*), by the customers (28 text units). This particular finding, which is felt to be significant, is discussed in more detail in paragraph 9.9.1.

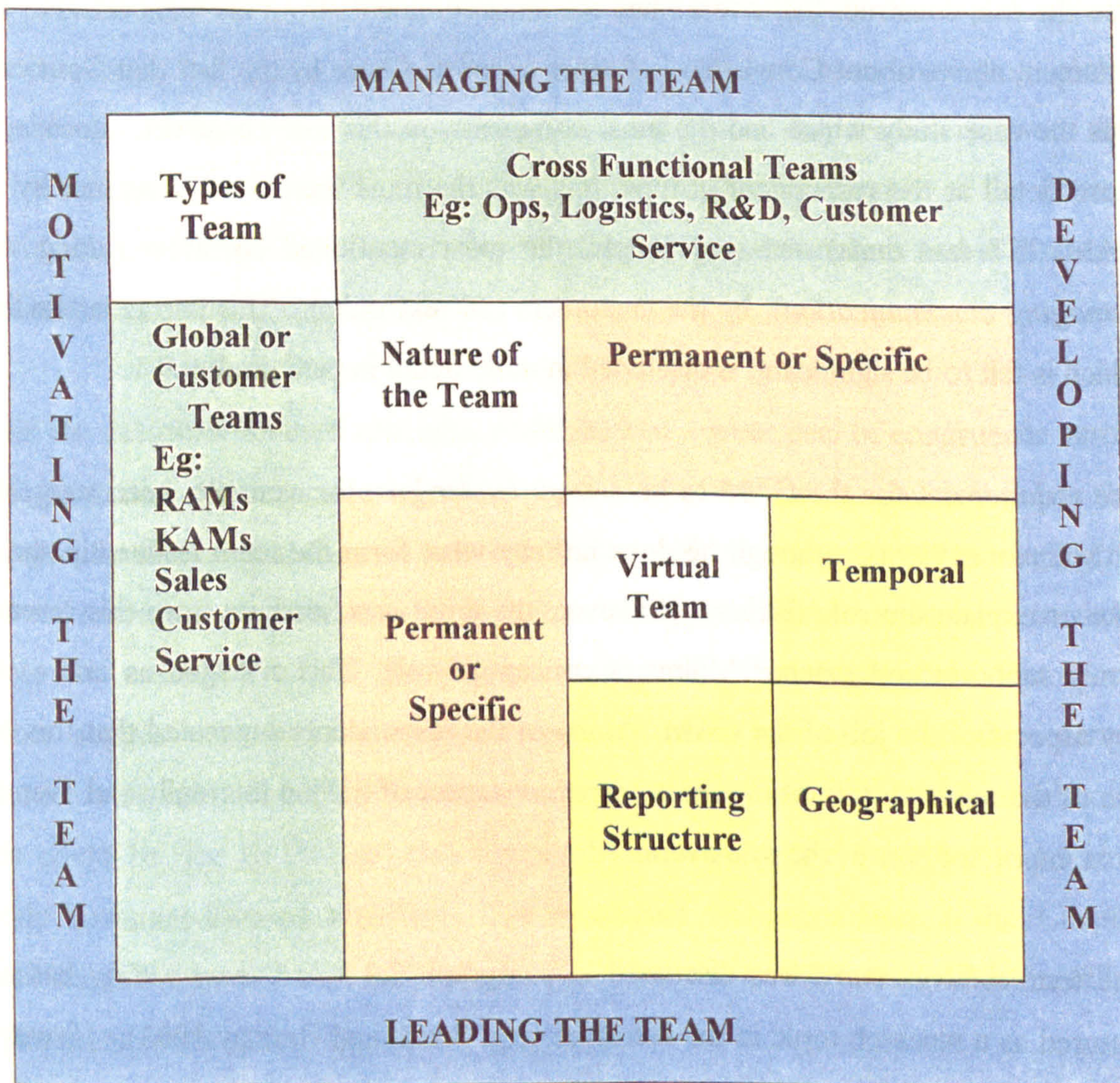
The requirement for the GAM to be a *team leader* has, for example, been suggested by Millman (1999b), although he does not say what form the team leadership should take or explain the role further. However, the cross-case analysis from this research firmly supports and extends Millman's conceptual role. This emerged as one of the key aspects of the job of the GAM. Many of the respondents suggested that this was one of the *important* if not *the most important* aspect of the job internally and even the most important part of the role overall.

The term *selling centre* was discussed in paragraph 2.3.3 and *team selling* has also featured as a research topic in the literature (e.g. Smith and Barclay 1993). However, while the global account teams described by the respondents could be termed *selling centres*, this terminology does not fit well with the strategic nature of long-term global customer relationship management. It is evident from the case studies that global account management is not about selling, but about managing established global customer relationships (see paragraph 9.9.4 for a more detailed discussion of this point). The researcher would therefore argue that these teams are not selling teams in

terms of the descriptions in the literature to date, but are teams specifically engaged in activities that are about *managing customers* and *working with customers* as opposed to *selling to* customers. Many of the customer comments supported this, as will be discussed in paragraph 9.9.4.

There are a number of sub-themes to this role that are worth exploring. A model for *managing the internal team* is shown in Figure 9.9.

Figure 9.9 A Model of Managing the Internal Global Team



Managing and Leading the Team

The over all role of the GAM in *managing the internal team* was described as *managing the team*, *leading the team* or *co-ordinating the team*. These terms were used interchangeably, although in those case studies or relationships that

were at an earlier stage of implementing a global approach, the term managing was used more frequently, which implied that the GAM needed to be actively managing the team. Indeed some of the comments were about being *hands-on* with the team management. Those at a more sophisticated level of global account management tended to talk far more in terms of the GAM being a *leader* of the team and giving direction instead of actively managing. The GAMs were also described as *co-ordinating* the team.

There was also the fact that the GAM had a role in *displaying leadership*, and being seen to be the leader in terms of the customer relationship. *Displaying leadership* was seen as particularly necessary where the GAM had little control or direct authority over those charged with the local implementation of global strategy.

Leading the Virtual Team

Two GAMs in case study 2 had a team member reporting directly to them, but for them more widely and for all the other GAM respondents, the teams they had to manage and/or lead did not report directly to them. Where it was not a directly reporting situation, the relationship between GAM and team was variously described as a *dotted line* relationship or an *indirect* relationship. Many of the respondents used the term *virtual* to describe the nature of the team. The team was described as *virtual* in a number of ways:

Geography: due to the nature of global relationships, many members of both the supplier's team and the customer's team were located in different countries around the world. This meant that they rarely got together face to face, so the team was described as being *virtual*. It existed in that team members were known and identified, but they rarely existed as a physical team in one location.

Reporting Structure: it was also described as *virtual* because the team did not report into one singular individual, group, function, country or region. It was only a team as a result of the requirement for the GAM

to pull together, for example, a team of all those involved in servicing the customer that the team existed at all.

Temporal: again the global business meant that many members of the team were operating in different time zones. This again made it difficult for the team to operate as a team at a given moment in time. Some of the GAMs said one way they managed this situation was to change the times of weekly, for example, team telephone conference calls, so that the team members took it in turns to be the one to get up at 2am in the morning.

Leading Different Types of Teams

The GAM could be leading different types of teams. For example, they might be leading the team responsible for *managing the customer* at regional and local levels. For example, these teams could be comprised of regional and key account managers, and customer services people, who were all responsible for the direct contact with the customer. These teams were either referred to as the *global account team* or the *customer account team*. The GAM might also be leading the team responsible for *delivering the global promise* for the customer. For example, those involved in manufacturing, operation or logistics. The global account team could also be made up from people from across these two groups, as was the case with CourierCo and ComputerCo. Or the team could be a *specific team* or *project team*. For example, it could be a new product development team working on a new customer product or service that included people from different functions. These types of teams were typically described as *cross-functional*.

The team could also be one which was a *core* team that was more or less a *permanent* team which had been formed by the GAM, or the organisation to manage the global customer, or as one which was formed to manage *specific* projects or tasks for the customer. These teams were usually *temporary* as they disbanded once the project or task has been completed. Generally the GAMs were involved in both types of team, usually in the team manager or team leader role, but also as a member of the team in some cases.

Motivating the Team

GAMs were also responsible for motivating the team. This was about building *good personal relationships* with the team. GAMs mentioned *celebrating success* and *doing team building activities* were good ways of motivating the team. *Keeping in touch* was also important because of the virtual nature of many of the teams. The GAMs needed to keep people motivated even though they rarely saw them face-to-face.

Developing the Internal Team

This was closely linked to *managing the internal team* and is a role not mentioned in the literature to date. This was not just about being the team leader but also about the ongoing development of the team. For case study 1 who had been engaged in global account management for some time, this was expressed in terms such as helping them to be *creative*, to *build their confidence*, to gradually get them to *take over responsibility of the customer*. In case study 2, an example was given of one of the team *being developed* by the GAM into the GAM role for succession purposes. For case study three, who had been engaged in global account management for only a year, this was expressed in terms of needing to *build* the team, and *develop* the team to be *effective as a team*.

GAMs were also involved in teams involving customers. Some of these were led by the customer organisation. In these cases, GAMs did not necessarily lead the teams, but they did participate in the team. Customers were also involved in supplier led team initiatives led by the GAM.

9.6.2 Knowing Own Organisation

The requirement for the GAM to know and understand their own organisation in depth, was the second most mentioned internal-focused role construct (31 text counts). However, in terms of magnitude, this role and the other internal-focused role constructs below, were of less consequence to all the respondents than the *managing*

the internal team construct. The same model as that outlined for *understanding the customer* would also apply here. It is not repeated here as it is identical except for substituting the word *customer* with the words *supplier* or *own organisation*. The other exception is *understanding the customer better than they do*. This would be substituted by *knowing their own organisation as it relates to the customer (better than anyone else)*.

The GAMs as a group did have a good knowledge and understanding of their organisations, which was supported by the tenure many of them had in their own organisations. The GAMs tenure ranged from two to over twenty years with an average of 9.8 years.

Three out of the five case study organisation respondents and two of the other organisation respondents, in their background interviews, expressed the view that while it was possible, (but not at all easy) to recruit GAMs from outside their own organisation, it took them longer to be effective because it took them time to get to know their own organisation. Until they did know the organisation they couldn't be effective in their role, as they couldn't, for example, easily recognise where the organisation's capabilities could help the customer.

So, one explanation as to why this was not mentioned more frequently by the other respondents, could be that it was taken for granted that the GAMs would know their own organisations. This would be primarily, because 8 out of the nine GAMs that formed the GAM respondent group had worked for their organisations for over 5 years.

9.6.3 Customer Advocate

The *customer advocate* role construct was very much a single respondent construct. While the GAMs did talk about this role (5 text counts), the customers were the primary source of the comments (21 text counts). The organisation and internal respondents did not mention the role at all. Being the customer's ambassador is suggested by Millman (1999b) as one of 8 global account manager roles. He described the role as the '*Voice of the Customer*', which is similar to *being the*

customer's advocate. The term *customer advocate* was also used by Wotruba (1996) when he was looking at the future role of sales. Millman and Wilson (1995) also suggested that one of the roles of a Key Account Manager was that of the '*customer's advocate/friend*'. Corcoran et al. (1995) describe this role using cricketing terminology as *going in to bat* for the customer. The term *customer advocate* is used to describe this construct as that is the term used by a number of the respondents in this research and it encompasses the range of views presented in the next paragraph.

Millman (1999b) does not determine which of the 8 roles are customer-focused and which are internally-focused. In the conceptual framework for this study it is found on the customer-focused roles. However, evidence from the customer respondents suggests that while the role is described using the word *customer*, it is a role that the GAM performs back in their own organisation. The customer respondents expressed it in those terms. They saw the role as the GAM *championing* their requirements back in the GAM's organisation, as *representing* their interests or *fighting our corner for us* with the GAMs senior management. They also expected the GAMs to present the customer's strategies to senior management and to articulate the customer's requirements at that level. This might also involve *making specific business cases* on the customer's behalf.

The GAMs also expressed this role in terms of, for example, '*they look to me as a potential opportunity to influence our people internally*'.

9.6.4 Providing Support

Only the internal team members across all four case studies saw that *providing support* to the internal team members was a role for the GAM. This construct has not been identified thus far in the literature, but it is argued by the researcher that this is a different role from the team leadership role construct described above. The emphasis given to it by the internal respondents (21 text counts) makes it a feature of the GAM role. This is also the first time that internal team members' views have been obtained on the GAM role, which is an explanation as to why the role has not appeared in the literature. Most of the conceptual work is still focused on the GAM-customer

interface and does not take into account the internal interfaces beyond mentioning the team leader role.

This role is about the GAMs *opening doors* internally and *removing obstacles* that are getting in the way of the internal people carrying out their roles effectively. A number of sub-themes emerged that team members are looking for in terms of support from the GAM.

Support in doing their job: the GAM's role here is to provide information, knowledge etc that can help the local manager, for example, to build closer relationships with the customer at local level.

Support in leveraging management: the GAM was in a position to raise issues with, for example, the local person's managers if they were having problems and also for *highlighting successes* and *giving visibility* to the achievements of the internal respondent.

Support in providing contacts: people on the team did not necessarily know whom to contact in other parts of the world and the GAM was in a position to facilitate and support this.

9.6.5 Managing the Political Environment

The *managing the political environment* role construct was mentioned in all four case studies, but was particularly a role stressed by the GAMs (12 text counts) and the Organisation respondents (5 text counts). Customers did not mention this at all, possibly because this is very much about the GAM being able to work easily in their own organisation. While this will ultimately be of interest to the customer, is not necessarily something that they articulate as important.

The need for the GAM to be aware of the internal political environment has been suggested by Millman and Wilson (2000), when they conceptually describe the role of the GAM as being that of the *political entrepreneur*. However, while this role construct is evident from the case studies, the data does not support the emphasis

given to this aspect of the role by Millman and Wilson (2000). However, the notion that the GAM must be politically sensitive and aware in order to be successful in the role is supported by the comments made in the interviews.

As well as using terms such as *managing the politics*, *being politically aware*, and understanding the *political environment* to describe the characteristics of this role, respondents also referred to this role as *knowing the ways to get around our organisation*, being able to *read internal situations*, and knowing when and where to *apply pressure and create leverage*. Another word that was used to illustrate this part of the job was that it was like being a *diplomat* with *diplomacy* being called for on a daily basis. This aspect of the job, was seen by the organisation respondents, as a challenge for the GAMs.

9.6.6 Exchange of Best Practice Internally

The *exchange of best practice internally* as a GAM role is not suggested in the literature, although it emerged as a construct in all four cases. All four saw there was a distinct role for the GAM in terms of managing and facilitating the exchange of best practice and learning. However, again this was a construct almost exclusively mentioned by two respondent groups, the GAMs and the internal group. An explanation is that descriptions of exchanging best practice given by the customer encompass the best practice from both organisations. For the GAM and internal respondents the internal best practice role is also about exchanging good ideas and practices that are found internally, which then facilitate the internal processes and systems rather than the customers'. Internally, it was expressed as *adapting ideas* from other parts of the organisation and identifying *business case studies* that can be *reciprocated* elsewhere in the supplying organisation.

9.6.7 Facilitating the Contract

The *facilitating the contract* role construct was mentioned by all the respondent groups but was also a case specific construct. As already highlighted in paragraph 7.5.1, this could be seen on first analysis from the interview data as a context specific role construct. Again not a role discussed explicitly in the literature, it is articulated

in the two case studies where major centralised global agreements between customer and supplier were explicitly mentioned as a key feature of the industries they were in; CourierCo and ComponentsCo. However, the background information supplied on the other two case studies, ComputerCo and EquipmentCo, revealed that their respective businesses are also conducted at the global level through the use of global contractual agreements.

The more interesting feature is that ComponentsCo (21 text counts) give more weight to this construct and the *facilitating the contract* construct as it relates to the customer than any of the other case studies. An explanation for this is given in paragraphs 7.5.1.

This internal role is about making sure all the supplier interfaces at regional and local level internally are all working to the global contract or agreement for the particular global customer and are not doing something at local level that is working against it. This was also articulated internally as the need to bring the contract *to life* in the organisation.

9.6.8 Being an Internal Consultant

Paragraph 9.4.1 refers to the literature on the salesman in long-term relationships being like a business consultant to the customer. It emerged from three of the case studies that the GAM also needed to be an internal consultant. However, it was a construct only talked about by the GAM respondents. The numbers here are really too small to make any detailed comment. This was expressed as having to ensure *proper routines* were in place where there were critical areas of service and that the organisation would then need them to be an *internal consultant* to move new ideas and processes forward.

9.6.9 Finding Opportunities

The final internal-focused role construct to be discussed is the *finding opportunities role*. The literature makes no mention of this either, although it was wholly the internal team members who described this role. The same comment applies here as

for the *providing support* role, and that is, that internal team members have not been researched prior to this study. Team members had an expectation that the GAMs would find opportunities for them to increase their business locally and to offer new products and services. It is closely linked to the role outlined in paragraph 9.5.4, but is more about opportunities to generate revenue directly.

9.6.10 Summary of the Cross-Case Analysis of the Internal-Focused Role Constructs

The cross-case analysis of the internal-focused role constructs has now been presented and discussed. There is a great deal of congruence and support for the first two of the constructs presented; *managing the internal team* and *knowing own organisation*. This is both across the case studies and from across the four respondent groups. However, unlike the customer-focused constructs, there is less congruence either from across the case studies, or from across the respondent groups for the other seven internal-focused constructs. Where there are differences between the case studies, as with the *facilitating the contract* construct, an explanation as to why this is occurring has been offered. Where there are differences between the respondent groups, as with the *customer advocate* and the *providing support* constructs, for example, an explanation has also been suggested. Data displays and models for the constructs have been presented where appropriate, supported by explanatory text as appropriate.

Having presented the cross case analysis of the internal-focused roles, the account planning-focused roles are now presented.

9.7 CROSS-CASE ANALYSIS OF THE ACCOUNT PLANNING ROLES

There was a lot of congruence and similarity across the cases on the account planning roles. All the organisations had some form of formal account planning, from a highly sophisticated planning system in EquipmentCo, to outline plan formats in ComponentsCo. CourierCo, ComputerCo and EquipmentCo had also started to involve the customer in the planning process, and had started to share all or some of the final plan with the customer. Account plans in CourierCo were increasingly signed-off by both parties.

While customer respondents (5 text counts) did comment on the two constructs that constituted the account planning roles, the majority of the comments came from the GAMs (31 text counts). Looking at the proportion of time spent by GAMs on these activities may partly explain this. Seven out of the nine GAMs estimated that they spent at least 5% of their time on this role. This only encompassed the time actually spent generating the plan including time with the team and the customer (if appropriate), but not the time spent communicating the plan and reviewing the plan. If this time had also taken into account, it would be likely that the GAMs would spend at least 10% of their time on account planning, a significant amount of time.

9.7.1 Account Planning

Generating account plans was identified by all the GAMs across the four case studies as being one of their roles, whether or not, as in the case of GAM7 they had actually yet done the plan. This aspect of the role is mentioned by Millman (1996), when he presented his tentative list of global account manager roles/responsibilities. However, little further discussion has taken place in the literature. This study has shown, however, that this is an important GAM role. Sub-themes of this role that emerged from the cross-case analysis are displayed in Figure 9.10.

The need for the plan to communicate: In the case studies, account plans were seen as a key method of *cementing the global account team*

and building the customer team around the world. The GAM's role was to involve the whole team in the planning process in order to get buy-in to the relationship internally.

Figure 9.10 Key Sub-Themes of the Account Planning Role Construct



The need for the plan to be long-term: where account plans were in place the GAM was seen as having to do more than a one year plan. Generally the plan was expressed as needing to be at least three years out and in one case, five years ahead.

The need for the plan to be strategic and global: this was expressed in terms of the plan containing the overall strategy for the global customer and while there would need to be local level short-term plans, the big picture for the customer would be in the GAM's plan. It was also recognised that the plan was needed at the strategic level to feed the resource plans and the investment plans for the customer and for the GAM's organisation. This role was also expressed in terms of the GAM being the strategist for the customer.

The need for the plan to be jointly developed: there were two groups of people who were involved in joint development of the plan:-

The internal team: GAMs needed to involve the internal team in the account planning process.

The customers: some of the plans were *agreed with the customer* and there was a requirement on the GAM to develop and produce a joint plan with the customer, or to at least *involve the customer in parts of the planning process.*

The need for the plan to be monitored: the organisation respondents also represented this account focused role in terms of *forecasting the business around the world on a regular basis* and *producing reports that monitor the global business.* There was also a requirement to get *the same reporting information across the world.*

9.7.2 Making business cases

This was identified in all four of the cases as being something the GAM needed to do. The only respondent group not to mention this was the internal respondents. An explanation for this is, that the business cases would normally involve presentation to senior management, and were therefore not something in which the internal team members would necessarily become involved. Customers, however, did perceive it as a role, as the business cases being made by the GAM could be for something that was also being driven by the customer. For example, one of the customer respondents expressed that they wanted the GAM to *build business cases* for joint developments and projects. This role was also expressed by a GAM as a requirement for *making business cases for specific projects for the customer.*

Another GAM saw the role as being like a *business director* in terms of *weighing up* different business scenarios, and being able to make some *balance of judgement* between losing something now, but gaining something in the future. GAM 3 said he needed the financial and business acumen to make business cases at Board level both in his own organisation and in the customer's. This suggests that GAMs need to have

an understanding of the broader aspects of business and bring business acumen to the role. This was necessary if they were to *command respect* at the highest levels in both organisations.

Having looked at the account planning roles, the cross case analysis of the spanning-focused roles is now presented.

9.8 CROSS-CASE ANALYSIS OF ROLES SPANNING CUSTOMER AND INTERNAL FOCUS

As already explained in paragraph 5.4.5, two role constructs in particular, cut across the customer and internal boundaries and it was suggested that they were also critical roles in underpinning all the other roles. In other words, if these roles were not in evidence, then it was likely that the GAM would find it difficult to carry out the others. This view is further supported by the cross-case analysis.

These roles were *Managing Communication* and *Managing Different Cultures* and were found across all four case studies and in all the interviews with the additional organisation respondents. There was also support for these two roles from across the respondent groups. Case study 3, in particular, showed a strong support for both these role constructs. If this is combined with the fact that their global account management programme had only been running for year, then further support is given to the idea that these roles are important in underpinning the others. For example, ComponentsCo were very concerned with their communications and getting them right. They also needed to do a lot of internal and external marketing in the customer organisation, to get the global agreement *off the ground*. They were also concerned with managing the cross-cultural issues as evidenced by the comments, in which they recognised that this was something they had started to focus on, and needed to be focused on more than they had.

9.8.1 Managing Communication

Managing communication as a spanning-focused construct was an external, customer-focused role construct in terms of *managing customer communication* and an internal-focused role construct in terms of *managing internal communication*. This was the second most mentioned role construct overall (91 text counts). While this role has not been explicitly discussed in the GAM role literature, Millman and Wilson (1999) suggest that *communication skills* are one of the 10 GAM competencies. It is also implicit in some of the other roles Millman (1999b) suggests such as the *information*

broker role. Biong and Selnes (1995) also suggest that communication is a boundary role behaviour in relational selling (see paragraph 2.5.2).

Communication was seen by many of the respondents as a key role for the GAM. It was described in terms of being *fundamental, critically important, key to underpinning the whole relationship, all pervasive* and *communication is everything*. These comments also serve to support the view that this is a role that underpins many of the other roles.

There were a number of sub-themes to this role both in relation to communicating with the customer and communicating internally. These are shown in Figure 9.11.

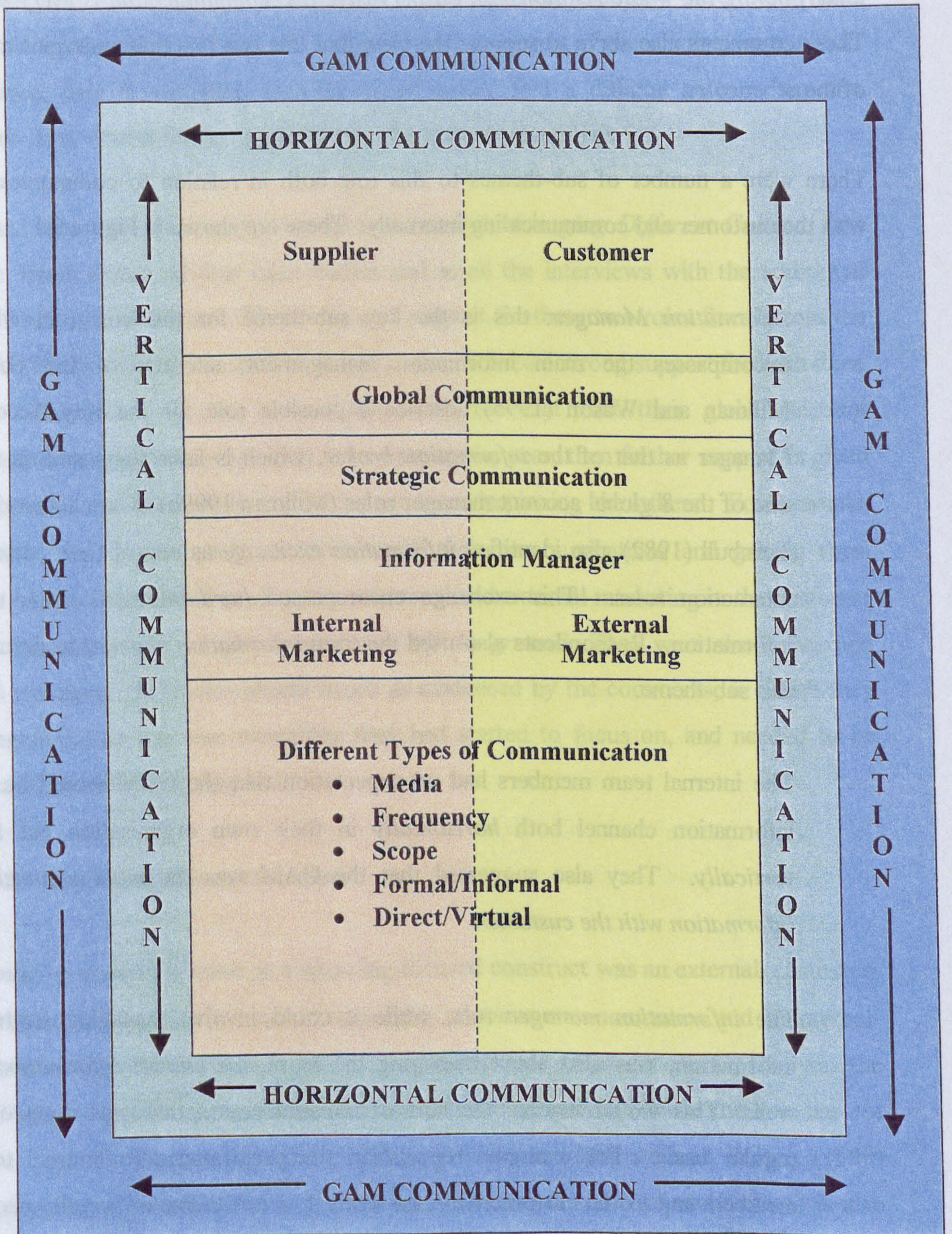
Information Manager: this is the key sub-theme for this construct which encompasses the main information management activities of the GAM. Millman and Wilson (1995) describe a possible role for the Key Account Manager as that of the *information broker*, which is later suggested, is also one of the 8 global account manager roles (Millman 1999b). Cunningham and Turnbull (1982) also identified *information exchange* as one of their personal interaction roles. This exchange encompassed *hard* information and *soft* information. Respondents also used the term *information channel* to describe this sub-theme.

The internal team members had an expectation that the GAM would be the information channel both *horizontally* in their own organisation but also *vertically*. They also suggested that the GAM was the *main channel of information with the customer*.

The *information manager* role, while it could involve managing strategic information, was also about managing the more *operational information* as well. This would involve the sort of communication that was done on a regular basis. For example, reports on the performance to internal team members and to the customer. In case study 1, a sub-theme of *keeping people informed* was identified separately from the *information manager* role. In the cross-case analysis this has now been subsumed within this sub-theme as it

was difficult to make a strong distinction between the two sub-themes in relation to the rest of the case studies.

Figure 9.11 Model of GAM *Managing the Communication Construct*



Strategic Communication: the GAMs were seen as managing the strategic communication between their own and the customer's organisation. They were in the position to do this at the global level and take the *global perspective* on the communication. They were also *communicating with people at senior levels* in both organisations, so part of this role was to communicate the strategic discussions to the appropriate people internally and in the customer organisation. The GAMs were also involved in *establishing global contacts* in terms of the global channels of communication as they were in the pivotal position to do this.

Different types of communication: this sub-theme had a further set of characteristics, which were about the ways in which the communication was carried out.

Communication Media: this was expressed in terms of whether the communication by the GAM was (in terms of preference) *face to face*, by *telephone (including teleconferencing)*, by *video conferencing* or by *email* and the *internet (or intranet)*, or by other *written communications* such as memos, notes, minutes or reports.

Frequency of communication: this was dependent on *what was being discussed or communicated*, *who was involved* in the discussion or communication, the *stage of the relationship* (customer/internal) and the *nature of the relationship* (customer/internal).

Scope of the communication: the way the communication was handled was also expressed as being dependent on whom the target was for, which could be the customer, the internal account team, the country managers and team, senior management and the Board. The global context of these customer relationships added another dimension in terms of cross-cultural communications. One respondent illustrated how different cultures preferred different types of communication, but that *tailoring* the communications can be hard.

Formal/Informal Communication: both formal and informal communications were used by all the respondents in their communication with each other. Social events were a good example of situations where informal communication could take place.

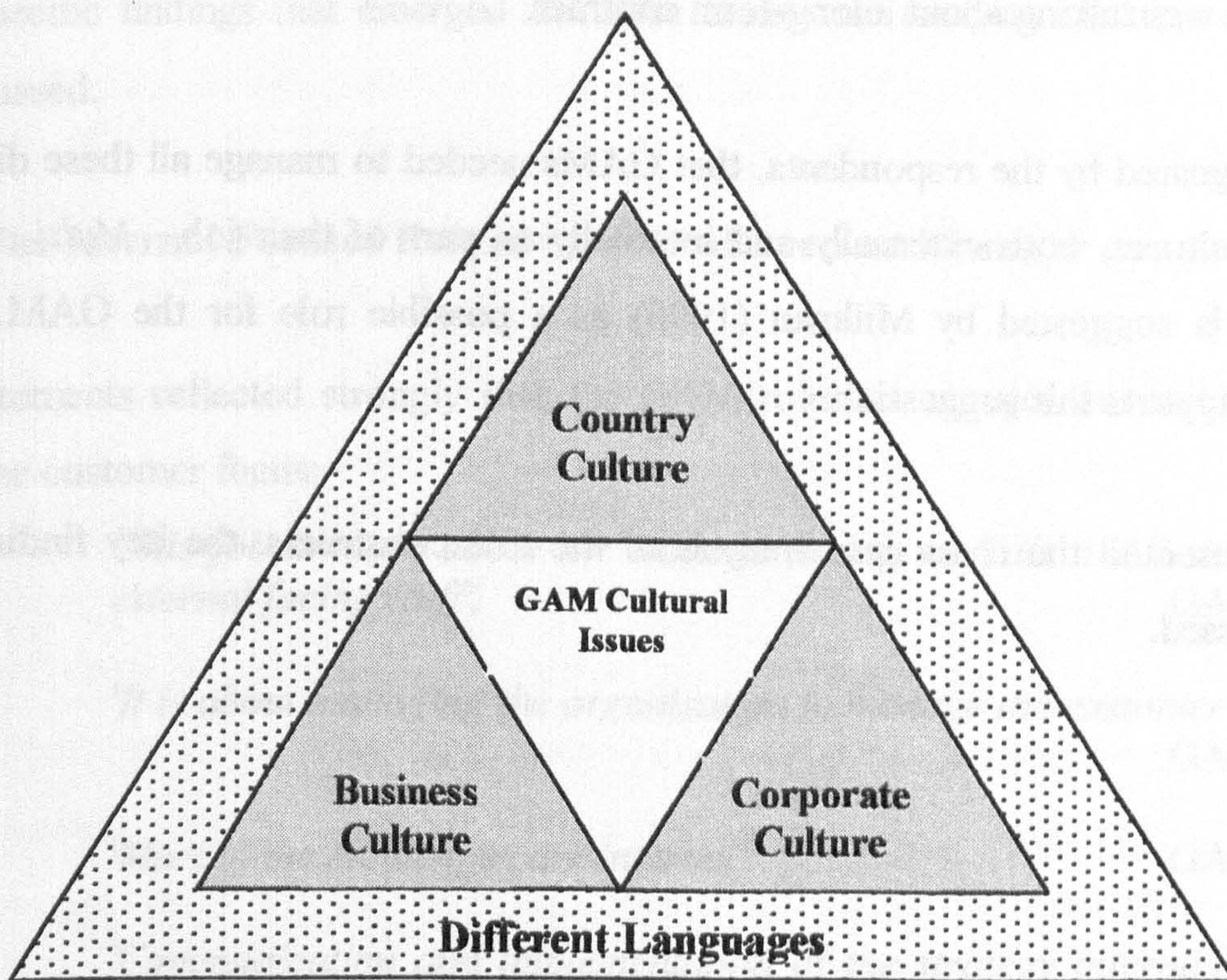
Internal and External Marketing: the requirement to carry out internal (own organisation) and external (customer organisation) marketing was found, in particular, in the ComponentsCo case study. However, there were also comments from ComputerCo and EquipmentCo, which supported this sub-theme. ComponentsCo, however, linked this need to do the internal and external marketing with the fact that they needed to do this, in order to facilitate the contract. This further supports the view that the communication construct underpins the achievement of some of the other role constructs.

9.8.2 Managing Different Cultures

Like the *managing communication* construct, the *managing different cultures* construct is evident from across all four case studies and from across all respondent groups. It is clear from the interviews with all of the respondents that the management of different cultures is a major issue for the GAMs in their role. In the global environment, GAMs had to manage the cultural aspects of their customer and the cultural aspects of their internal team members and their organisations more widely. It was evident from comments that this was a key role that separated global account management from key account management. For example, GAMs needed to be *culturally aware, sensitive to different cultures, be comfortable and adaptable in operating in different cultures* and be good at *managing cross-cultural teams* (customer and internal).

However, what also emerged from the analysis is that culture as a construct is complex. There emerged a number of different sub-themes to the role, which are represented in Figure 9.12.

Figure 9.12 Cross-Cultural Issues in Global Account Management



Managing different country cultures: this was about the different national traits people had expressed such as Americans being *aggressive*.

Managing different business cultures: this was about the different ways of doing business, or the way in which the country culture impacted the business culture of different countries. Org8 referred to this as managing the cultural *business orientation* of the customer or the internal team.

Managing different corporate cultures: this was different from the business culture, and was about organisations having different corporate cultures both across organisations, and within organisations. For example, the corporate culture in London was described as being different from the corporate culture of the American HQ by Cust3.1.

Managing different languages: this was linked to the country culture but was also expressed in terms of causing *misunderstanding*. One respondent said that even between the English speaking team members you could get problems

with language and interpretation. For example, she, as an American had referred to an *evergreen* and the two British people on the team had no idea she was talking about a long-term contract.

It was suggested by the respondents, that GAMs needed to manage all these different types of cultures, both externally and internally as part of their job. *Multi-cultural teamwork* is suggested by Millman (1996) as a possible role for the GAM. This research supports this suggestion.

Having presented the cross case analysis of the role constructs, the key findings are now discussed.

9.9 FURTHER DISCUSSION OF KEY FINDINGS

Some specific findings that emerged from the cross-case analysis are now explored and discussed.

9.9.1 The Internal-Focused Role of the Global Account Manager

Four statements reflected strongly that the GAM role has a major internal focus as well as the customer focus:

'This job is more about the internal facing stuff than it is about the external facing stuff.' GAM4

'It is about managing the organisation to manage the customer.' GAM6

'Most of the challenges are internal.' GAM3

'Communication and implementation of the strategy internally. That takes about 60-70% of my time.' GAM1

The statement by GAM4 was the first comment made to the researcher before the formal interview began.

Historically, sales roles have been represented in terms of the relationship to the customer. The salesperson role has been seen as a customer-focused role with the old adage ringing true *'why are you sitting at your desk? You should be out on the road selling to customers'*. In Chapter 2 there was a discussion about the changing nature of sales, but to date, those who have suggested what the activities should be for managing long-term sales, for key account management roles and global account management roles are still largely defining the roles using customer-focused terms.

Millman and Wilson (2000) recognise that there may be a major internal job for the GAM and that the job is performed at the boundary spanning internal interface. However, to date they have not yet attempted to carry out a full empirical study of the type of research study presented in this thesis. Indeed they recognise they have presented *'a number of tentative observations'* and some *'insights into the nature of the role'*. They go on to say that:

'In this newly emerging field we have merely scratched the surface of the role of the global account manager and hope that our work will serve to stimulate others to explore what we believe to be an important area of interest'.

In the academic literature on key account management and global account management, the *team leader* role is identified, but many of the other internal roles have not been sufficiently explored. This is one of the gaps that this research has sought to address. But why is this seen as an important issue?

Well, if people in customer-focused boundary-spanning type roles are performing internal tasks, they are often described in terms of having to *'firefight'*, because the assumption is that the organisation is not sufficiently aligned to the customer. For many practitioners there is simply no recognition that these roles may have some legitimate internal focus. Generally, salespeople and key account managers are rewarded for what they achieve with the customer, not for what they achieve internally. Indeed, in all four case studies the GAMs were mostly rewarded for what they achieved with the customer, e.g. in terms of financial goals. Only the GAMs at ComputerCo had actual targets based on what they had achieved in terms of leading the internal team.

What this in-depth research shows however, is that there is a legitimate and major internal role for global account managers. Managing the internal team and the other internal roles and, as GAM6 has put it, managing the internal organisation more generally, has emerged as a significant part of the job. This is further supported by the questions that were asked of the GAM in terms of the time spent in carrying out the customer-focused roles and the time spent carrying out the internal-focused roles. The responses are summarised in Figure 9.4. While it is not statistically valid to take the average, as an illustration, it shows that on average GAMs spend approximately 30% of their time on the customer-focused activities and 70% in total on the internal-focused activities, including account planning.

The big question is why is this? To date, while anecdotally it has been evident for some time that account managers, whether they be global or not, spend a lot of time on internal activities, the small amount of research into KAM and GAM roles that has

been carried out, has not really addressed this issue. This is probably because most of the research has been carried out by asking account managers to describe what they do. So how does this research add to the knowledge we have about the nature of these roles? Well, they are boundary roles and boundary roles face both ways and they also have a management interface within their own organisation. This research set out to not only interview global account managers, but as part of the research design to interview their managers, customers and internal team members. It is possible that if only the GAMs had been interviewed that we would still not know whether their time spent internally, was purely firefighting or whether there were legitimate internal roles for the GAMs. However, the strength of this research lies in the fact that all of the other respondent groups identified key internal activities for the GAMs. The customer group is particularly important in identifying these activities, since they are outside the organisation, and while they are involved in relationships with the supplier, they should be taking an independent view of what they expect the role to do. This then, is a key finding from the research and provides a much richer picture of the role of the global account manager than hitherto.

Figure 9.13 Summary of the Estimated Time Spent By GAMs on Different Aspects of their Role

	Customer-Focused Roles	Internal Roles	Focused Account Roles	Planning
GAM 1	30	65	5	
GAM2	25	70	5	
GAM3	40	55	5	
GAM4	35	64	1	
GAM5	30	65	5	
GAM6	20	75	5	
GAM7	30	70	0	
GAM8	30	65	5	
GAM 9	30	65	5	
Average	30	66	4	
Time Across the GAMs				

9.9.2 Difference between those early in the GAM process and those later in the GAM process

As explained in paragraph 4.2.2, as part of the research design, and in order to make for a more rigorous cross case analysis of the data, it was decided to try to look at a spectrum of organisations in terms of the length of time they had been running their global account management programmes. The final sample is in Figure 9.14.

Figure 9.14 Sample by Length of Time the Case Studies Have Been Running Their Global Account Management Programme.

Length of Time Running GAM programme	Case Study Organisation
0-1 year	Case Study 3
Over 3 years	Case Study 2
Over 5 years	Case Studies 1 and 4

Evidence from the cross-case analysis suggests that the length of time that an organisation has been running with a global account management programme has an effect on the focus of the customer organisation. For example, case study 3 had only been managing customers on a global basis for a year. While one of the customers, for example, Cust6.1 had a lot of experience in managing global suppliers, ComponentsCo were still very much focused on what they needed to do internally. This was expressed in terms of *building the team, getting the internal marketing going, facilitating the contract* (externally and internally), and *getting people on board with the idea of GAM*. They also expressed greater concern than the other case studies about *managing communication* and *managing culture*. In other words they were more operationally focused. Case studies 1, 2 and 4, on the other hand, talked far more about *developing new ideas and opportunities, developing strategic relationships, developing forward looking plans, moving forward and implementation of strategy*. This would suggest they are taking a far more strategic approach to the

customer. While the length of time did not seem to impact the description of the role constructs and sub-themes of the GAM role, there did seem to be a suggestion on where the main *focus* of those roles was, in relation to the length of time the global relationship had been in existence. This is not suggesting a direct cause and effect relationship as is consistent with positivist approaches to research, but rather, as is the case with realist research, to suggest that this is an example of a broad generative mechanism in a context that makes it contingent (Healy and Perry 1998).

The focus of the GAM over time would move from operational in the early stages of implementation to a strategic focus in the longer term, even if the organisation appears to understand that global account management is a strategic activity. This relationship between the focus of the GAM and the length of time the global account has been managed as a global account is shown in Figure 9.15.

Figure 9.15 Model Showing the Focus of the GAM and the GAM's Team Over Time

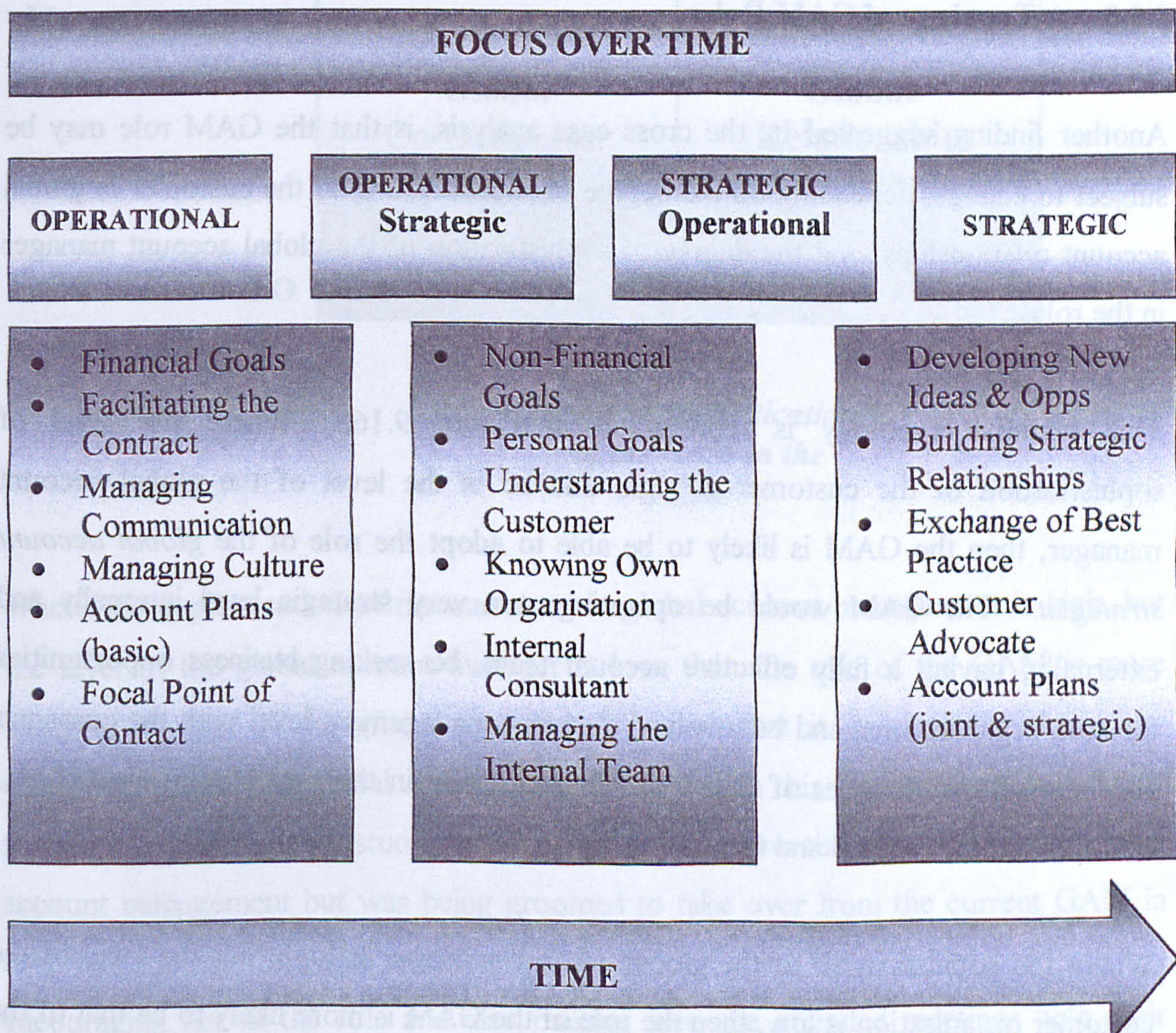


Figure 9.15 shows the role constructs that represent the focus of the GAM over time as the global relationships develop. On the left-hand side of the model are the roles that are suggested from the cross-case analysis that the GAM would focus on in the early stages of the global relationship. Of the case studies, ComponentsCo is located towards the left-hand side of the model. On the right-hand side of the model are the roles that the GAM would focus on when the global relationship was well established. ComputerCo, CourierCo and EquipmentCo are located towards this right-hand side of the model.

It is important to point out that the context of all the relationships in the sample was, firstly that they were existing global relationships, secondly that both parties wanted the global relationship, and thirdly they were interdependent in nature. The point being made here with reference to Figure 9.15, is that even with existing and agreed global relationships, there is still a development process of the global relationship in terms of the focus of the GAM over time.

9.9.3 A Typology of GAM Roles

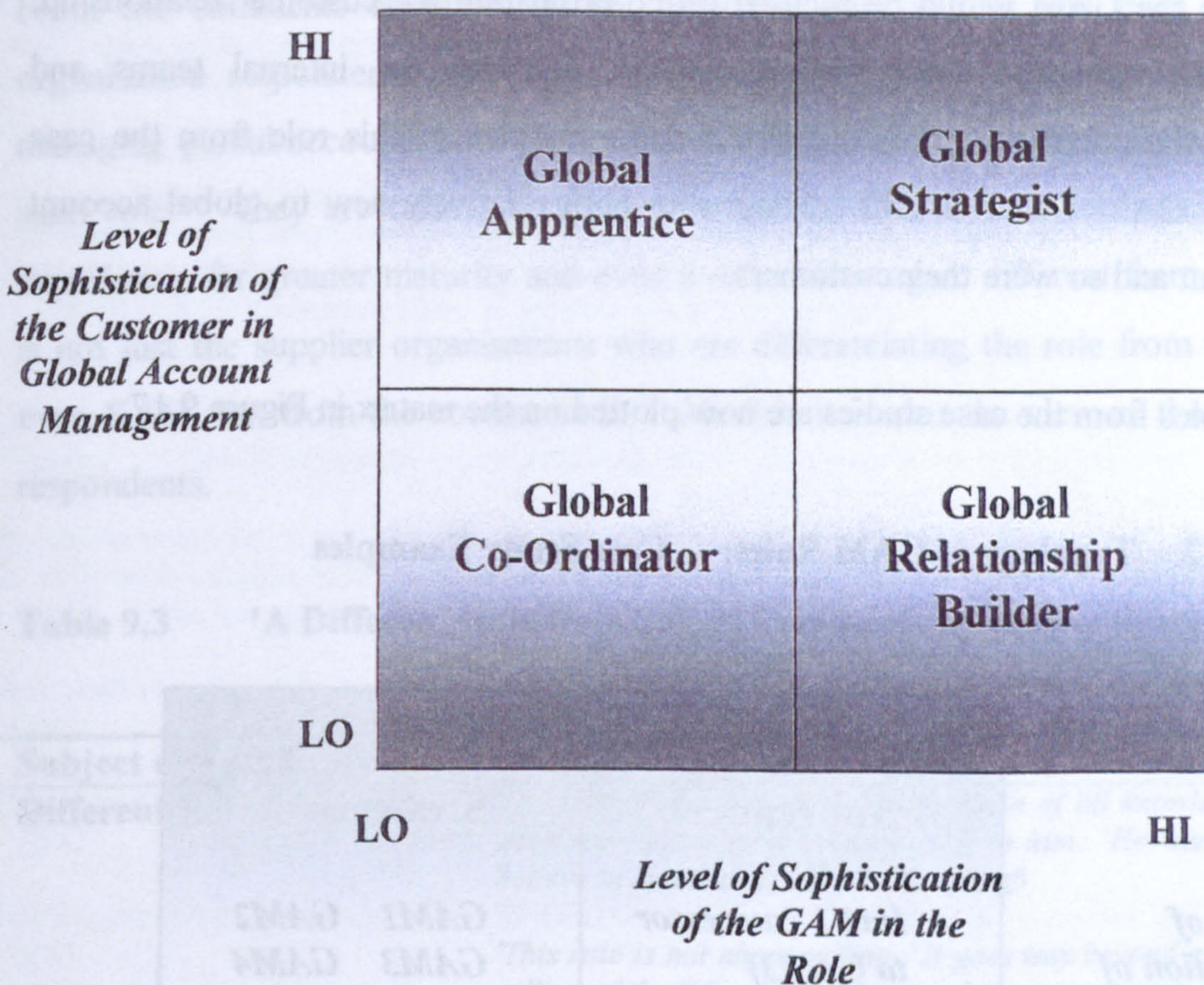
Another finding suggested by the cross case analysis, is that the GAM role may be subject to change, depending on the degree of sophistication of the customer in global account relationships, and the degree of sophistication of the global account manager in the role.

This tentative typology is represented in Figure 9.16. Where the level of sophistication of the customer is high, and so is the level of the global account manager, then the GAM is likely to be able to adopt the role of the *global account strategist*. The GAM would be operating at a very strategic level internally and externally, having a fully effective account team, be seeking business opportunities for both organisations, and be involved at senior management level with the customer and internally. Examples of GAMs fulfilling this role in the case studies are GAM1, GAM2, GAM3, GAM 4 and GAM9.

Where the sophistication of the global account manager is high, but the level of the customer organisation is low, then the role of the GAM is more likely to be that of the

global relationship builder. The role here would be to build the relationship with the customer to a more strategic level. Activities might include developing some new opportunities to move the customer forward, building up some key relationships, helping to set up their teams, doing some consultancy, and facilitating meetings between the organisations at senior level. An example of a GAM in this role is GAM5 where he was experienced in account management but the customer had only been involved in global account management for a year.

Figure 9.16 A Typology of Global Account Manager Roles



Where the sophistication of the customer in global account management is high, but the level of the global account manager is low, then the role of the GAM is more likely to be that of the *global apprentice*. Given that it is suggested that many customers are driving global account management, then this type of situation is likely to exist. In this research study, Int3.2 expressed the view that she was new to global account management but was being groomed to take over from the current GAM in two year's time. She also mentioned that the customer, Cust3.1 had been actively encouraging her in the role and also making sure she attended meetings with their

senior team including the European Board. This was also mentioned by Cust3.1. There was also some evidence of this in the relationship between GAM6 and Cust6.1, where Cust6.1's organisation had been involved in global account management for a lot longer than ComponentsCo. Cust6.1 expressed that he had been a catalyst for ComponentsCo adopting global account management. He also said that while GAM6 was a *natural* global account manager, he thought that he could help GAM6 to *develop* his global account manager skills.

Finally, where the level of sophistication is low for the customer organisation and the global account manager, the GAM role is likely to be more of a *global co-ordinator*. In this role the GAM would be focused on co-ordinating the customer relationship, ensuring the operations and service delivery, building the internal teams and facilitating the contracts. It is suggested that examples of this role from the case studies are GAM 7 and GAM8. They were both relatively new to global account management and so were their customers.

The examples from the case studies are now plotted on the matrix in Figure 9.17.

Figure 9.17 Typology of GAM Roles: Case Study Examples

HI <i>Level of Sophistication of the Customer in Global Account Management</i>	Global Apprentice GAM6 <i>Int3.1 (successor to GAM3)</i>	Global Strategist GAM1 GAM2 GAM3 GAM4 GAM9
	Global Co-Ordinator GAM7 GAM8	Global Relationship Builder GAM5
LO	LO	HI
		<i>Level of Sophistication of the GAM in the Role</i>

9.9.4 A Fundamentally Different Role from Sales

Millman and Wilson (2000) suggest that, with the global account manager we may be witnessing the emergence of a fundamentally new managerial position. They say that were the *'role only concerned with boundary spanning, then it would be little different, although with added degrees of complexity, from the role performed by general line sales people'* (Millman and Wilson 2000). This research empirically supports and extends their suggestion that the complexity of the role and its strategic importance, does make this fundamentally different from a traditional sales role. From the comments contained in the individual case studies and from the other organisation respondents (see Table 9.3), it is clear that organisations involved in managing global accounts have themselves decided that this is a different role from a sales role. They are talking about a role that requires more than traditional sales experience, far greater maturity and even a role that is again different from KAM. It is not just the supplier organisations who are differentiating the role from sales, and even KAM, but from the comments in Table 9.3, it is also the view of the customer respondents.

Table 9.3 'A Different Role from Sales': Comments by Respondents

Subject of Text Unit	Text Unit
Different Role From Sales	<i>'The customer wants to go the fountain of all knowledge and he doesn't want someone who is trying to sell to him. He wants someone he can believe in and trust in'.</i> Org5
	<i>'This role is not about selling. It goes way beyond even the consultative selling of the '90s. So you know, what you need now is what I describe as a 'visionist' approach'.</i> Int7.2
	<i>'What we're trying to do is to get them to feel confident with us, feel confident to talk to us and trust us and the last thing I want to do is for them to see me as the salesperson trying to sell them widgets. I want them to see me more as a partner'.</i> GAM6
	Org3 <i>'These aren't your average sales people. It's not a traditional sales job - banging on the door job, that's for sure. The kind of person we're looking to recruit as the new GAM who will be based in Germany. Well, one of the candidates has a PhD, another one a Masters in Engineering. So, they're good quality people, they're high calibre people'.</i> SH <i>'So they're not just people with a sales background?'</i>
	Org3 <i>'No. In fact one of the things we liked about [GAM6] was the fact that he, while he had some sales experience, his real background is</i>

military, he's a military officer.So, he's a natural at leading the team and at making decisions off his own back'.

'It is often a sales person who develops into a key account manager who develops into a global account manager. Those kinds of people are sales people and they're individuals going off to bring in business. They're not man managers, they haven't any skills in the area. It is more of a management type role - it is more of a business management role'.Int2.4

'Maybe the superficial role of, you know the salesman and fancy presentations and all that is not what we look for in a global account manager. What we're really looking for is a global account manager who really, you know is part of us and he sees himself as wearing two hats. You know [CourierCo] pay me but you know, [the customer] pays CourierCo to pay me. So, I guess in a nutshell that's really what we look for and they're not easy to find'. Cust2.2

'We were specifically really looking for somebody who had supply chain management understanding and not just a salesman who had a good story to tell and didn't really understand what he was talking about. That really wasn't any good for us, you know. It had already gone beyond that point'. Cust2.1

'You know its not a salesman. We would prefer somebody who's come up from the inside of [CourierCo], or at least in the industry and understands the ins and outs of [CourierCo] and how to get at the good and the bad in order to be able to you know, in order to produce the best for us'. Cust2.1

'It is not an easy job to fill. It can be a huge leap from sales and KAM roles to the GAM role which is very difficult to handle'. Org7

'These are business managers. They are not senior salespersons. If you give the senior salesperson the title of GAM and send them off to the customer, they can see right through them from day one'. Org7

'Many salespeople don't enjoy managing people, whereas these roles demand a degree of people management'. Org7

'The people you need in these sorts of positions are light years away from traditional sales and key account management even'. Org9

'All these are the sort of skills framework we expect for rising CEOs and managing directors. Org9

'They need to be global managers - not global salespeople'. Org8

'What seems to differentiate these roles from sales people is the need to be partly a project manager, but also being innovative and being able to think and operate strategically. It is very like my own job with the suppliers'. Int8.2

Age of GAM

'You'd be fairly sure they're not going to be in their 20s, they're going to be in the mid-30s probably just to have the right business acumen. Maybe they're even going to be in their forties. They will probably need both business and sales track records'. Org5

'Maturity, I think is critical. I would say that for these senior roles that it is likely that they would need to be at least mid-30s'.Int7.2

Experience of the GAM

'We need the GAMs to live in the role for 5 years. They need to be at the more mature end of the employment cycle. They must have five year window in these roles as part of their career progression. This is partly driven by what the customers tell us'. Org 6

'Certainly for your top tier clients you need to be recruiting people like myself. Quite simply the 30-35 years olds, unless they are exceptional just don't have the experience and maturity'. Org9

'I have a financial background as well as a sales background and that's been a tremendous help because I understand the financial impact of any decisions we are making'. GAM9

'You can't become a GAM on day 1 in the company. To be an account director you would need at least a 3-5 year knowledge of the company, it's customers and the industries that they are in'. Org5

'I really don't think that coming from a sales background is the best, maybe come from a mixture of sales and service, certainly customer service is important. I think the broader the experience the better the GAM'. Cust6.1

'You simply cannot take a salesman off the street and put them in this role. Experience of operating at a senior level is needed to be effective. You have to be able to build empathy with people and you need to have developed the people skills'. GAM4

'They've got to be someone pretty senior, very senior with a lot of commercial experience. They have had to have a lot of success in fact, and the ones that we do have are all very, very good. I mean they have to know the business as well. In terms of specific types of skills they have to be great. It's much more than sales, I mean its business development, they have sales people working for them, but they have to be people that are pretty much focused, the people that can be empathetic with the customer, the people who can see the big picture.....They have a lot of respect in the organisation at the highest levels.' Org1

*'Our GAMs are senior managers. They are not junior slots by any means and they are **not sales persons either**'. Org7*

'MBAs are nice to have. I see this as a goods job for an MBA'. Org7

'You have to have a certain amount of 'been there and done that' in this type of role. Quite a few of us are seasoned and mature executives who have been brought up to do these types of roles'. Org9

'The GAMs have a variety of backgrounds now, rather than sales and marketing. One GAM comes from operations management and the GAM in Australia has a manufacturing background. Production people often make a very good transition to the role as they often have excellent internal contacts and understand the whole business'. Org8

'This is not an easy job to do. It takes us years to develop the people to do this role properly'. Org2

It is important to point out here, that the key account manager role has been suggested as being different from a traditional sales role as well (Millman and Wilson 1995, McDonald et al. 1997). However, key account managers are often seen as residing at country level, even though organisations are becoming more pan-European, international, multi-national or global. Comments in Table 9.3 suggest that the GAM role is again different from KAM in terms of the experience needed to carry out the role. While there are undoubtedly key account managers working at a strategic level with major customers, the GAM role seems to be emerging as an even more strategic role in the sense that even where the GAM is involved in day to day operations, all four respondent groups describe the role in such terms as; *building strategic relationships, operating at a strategic level, the ability to talk at a strategic level, building customer strategies, knowing the organisation's strategies and understanding the customer's strategies.*

The comments from respondents about the age at which someone is ready to take on a GAM role are also significant here. The comments (see Table 9.3) that people should be in their mid to late 30s or even early 40s before taking on the role, suggest that in terms of career development, they would take on a GAM role at the same kind of age as people take on an MD or other senior management role. This further supported by the attribute data of the respondents in this study (see Table 9.4). The GAMs in this study ranged from 35 to 51, with an average age across the respondents of 40 years. They are all mature people with a lot of experience.

Two other aspects to this are shown in Table 9.4. The first is the experience that the GAMs in the study had prior to becoming a GAM. As can be seen from the data, all of the GAMs had sales or KAM experience and all of them had held some sort of management position in their careers. The other observation is that all bar one respondent had also had experience in roles that were not sales or KAM. This attribute data triangulates with many of the comments above in Table 9.3 about the *Experience of the GAM.*

Table 9.4 Age, Experience and Organisation Tenure of the GAMs in the Study

Respondent	Age	Experience			Length of Time in Org
		Sales/KAM	Gen Mgt	Other	
GAM1	37	Yes	Yes	Ops Teacher	10 years
GAM2	40	Yes	Yes	Logistics Project Mgt	6 years
GAM3	39	Yes	Yes	Tech Consultant Cust Service	15 years
GAM4	51	Yes	Yes (senior)	Various	6 years
GAM5	45	Yes	Yes	Tech Support Systems Analyst	8 years
GAM6	35	Yes	Yes	Army Officer	2 years
GAM7	43	Yes	Yes	Ops	20 years
GAM8	37	Yes	Yes		10 years
GAM9	35	Yes	Yes	Accountant	12 years

Secondly, the length of time the GAMs had been with their particular organisation was important. Again, comments in Table 9.3 and throughout this thesis have talked of the need for the GAM to *know their own organisation* well, of the need to *know the industry* and of the need to *understanding the customer*. The GAMs length of time with their organisations ranged from 2 to over 20 years with an average across the group of 9.8 years. This attribute data also supports and triangulates with the comments in Table 9.3.

It may also be of consequence that the ways in which GAMs are beginning to be compensated and rewarded are changing, and where they are in the organisation in terms of seniority. For example, the global account manager at ConsultancyCo was at senior partner level and was rewarded in the same way as a senior partner.

The comment from one respondent, that the GAM role was becoming more like a *Managing Director for the Customer*, rather than reporting into an MD of a region, sales function, business or SBU, further suggests that it may yet evolve into a role that heads up an SBU, with sole responsibility for a customer, rather than for a line of business or a product. This would have implications for how companies are structured in the future.

Finally, the researcher suggests that, based on the above discussion, that the terminology used to describe the role e.g. *Global Account Manager*, is part of the problem. The words *global* (the role is global), and *manager* (the role is about management), do not present a problem. It is the word *account* that has the selling connotation. Much of the research from academics still uses selling terminology when describing these roles (e.g. Arnold et al. 2001), even though they accept the role has little to do with selling in the traditional sense. The researcher believes there is a danger that researchers and practitioners will continue to see this role as an extension of the sales role, unless the terminology starts to change. The researcher, therefore, suggests that the better terminology for this role is *Global Relationship Manager*.

9.9.5 Some Differences Between Global and Key Account Management

Some differences emerged from the research between key account management and global account management in terms of roles. While very little empirical research has been published on the roles of key account manager (Homburg et al. 2000), the cross case analysis showed that there were some conceptual models in the literature and, in particular, the work of Millman and Wilson (1995). While some of the roles are recognisably and broadly similar, there are some key differences that the analysis of the role constructs has revealed. We have already discussed some differences between global and key account management in paragraph 9.9.4. Here are two more of the fundamental differences.

Managing Cross-Cultural Teams and Different Cultures

One key difference between the two roles is that of *managing different cultures*. While a key account manager might arguably have to manage their own culture and that of their customer, they do not have the cultural differences in terms of managing

teams of people both externally and internally around the globe. This is a major difference in view of the importance placed by all of the respondents on the role. The GAMs were seen as having to be very culturally adept and flexible. They had to be good at moving swiftly between cultures and communicating in ways that different cultures would understand. None of these activities is generally a requirement of the KAM role.

The Management of Virtual Teams

KAMs are generally working in some sort of matrix structure, so they do have to rely on people in the *virtual account team* to deliver for them. However, GAMs have to manage teams that are also virtual geographically, in terms of being located in many different countries across the globe. Because it is rare for them to be able to see all of the team, even once a year, they have to be capable of motivating and building a team without little or any face to face situations. This means that communication is an even more critical part of the role.

Different members of the customer and internal teams are also working in different time zones, bringing an added complexity to the GAM job. It is often not possible to even teleconference with the whole team, or key members of the team, at a given point in time. GAMs have to find ways of working within this complexity. It is rare for KAMs to find themselves managing this kind of complex situation.

This concludes the discussion of the findings from the cross-case analysis. In paragraph 9.10, the role constructs are now qualified and then, by way of a summary, are related back to the original conceptual framework.

9.10 SUMMARY OF THE FINDINGS FROM THE CROSS-CASE ANALYSIS OF THE GLOBAL ACCOUNT MANAGER ROLE CONSTRUCTS

The role constructs that emerged from the within-case data analysis and the cross-case data analysis, have now been presented and discussed. Key similarities and differences between the case studies, and between the different groups of respondents, have also been discussed. This has allowed a process of qualification and enriching of the constructs, particularly with the sub-themes. The constructs have also been weighted and ordered as a result of the data analysis. Many of the constructs have been presented using data displays and models, as is consistent with presenting qualitative data (Miles and Huberman 1994), case studies (Yin 1994) and Realism research (Healy and Perry 1998). It is also customary with qualitative research to show the degree to which the constructs that have emerged, have been qualified and validated by the data. Table 9.5 represents this qualification.

Table 9.5 Qualification of the Role Constructs

Role Construct	Cross-Case Support	Cross-Respondent Group Support
Goal-Focused		
Financial	√√√√	√√√√ Org GAM √ Cust Int
Non-Financial	√√√√	√√√√ GAM √ Org 0 Cust Int
Personal	√√√√	√√√√ GAM 0 Org Cust Int
Customer-Focused		
Developing New Ideas & Opps	√√√√	√√√√
Understanding the Customer	√√√√	√√√√
Building Strategic Relationships	√√√√	√√√√
Focal Point of Contact	√√√√	√√√√ Cust Int √√ GAM √ Org
Facilitating the Contract	√√√√ ComponentsCo √√ CourierCo √ EquipmentCo 0 ComputerCo	√√√
Exchange of Best Practice	√√√	√√√√ Cust GAM √ Int

			0	Org
Internal-Focused				
Managing the Internal Team	√√√√		√√√√	
Knowing Own Organisation	√√√√		√√√√	
Customer Advocate	√√√√		√√√√	Cust
			√√	GAM
			0	Org Int
Providing Support	√√√√		√√√√	Int
			0	Org GAM Cust
Managing Political Environment	√√√		√√√√	GAM
			√√√	Org
			√	Int
			0	Cust
Exchange Best Practice Internally	√√√		√√√	GAM Int
			√	Org
			0	Cust
Facilitating the Contract Internally	√√√√	ComponentsCo	√√√	GAM Cust
	√√√	CourierCo	√	Org Int
	0	ComputerCo		
		EquipmentCo		
Internal Consultant	√√	CourierCo	√√√	GAM
		ComputerCo	0	Org Cust Int
		ComponentsCo		
	0	EquipmentCo		
Finding Opportunities	√√	CourierCo	√√√	Int
	√	EquipmentCo	0	Org GAM Cust
Account Planning-Focused				
Account Planning	√√√√		√√√√	GAM Org
			√√√	Int
			√	Cust
Making Business Cases	√√√		√√√	GAM
			√√	Org Cust
			0	Int
Spanning-Focused				
Managing Communication	√√√√		√√√√	
Managing Culture	√√√√		√√√√	
Degree of Support:	√.....√√√√√√√√√	
	<i>Weak</i>		<i>Strong</i>	

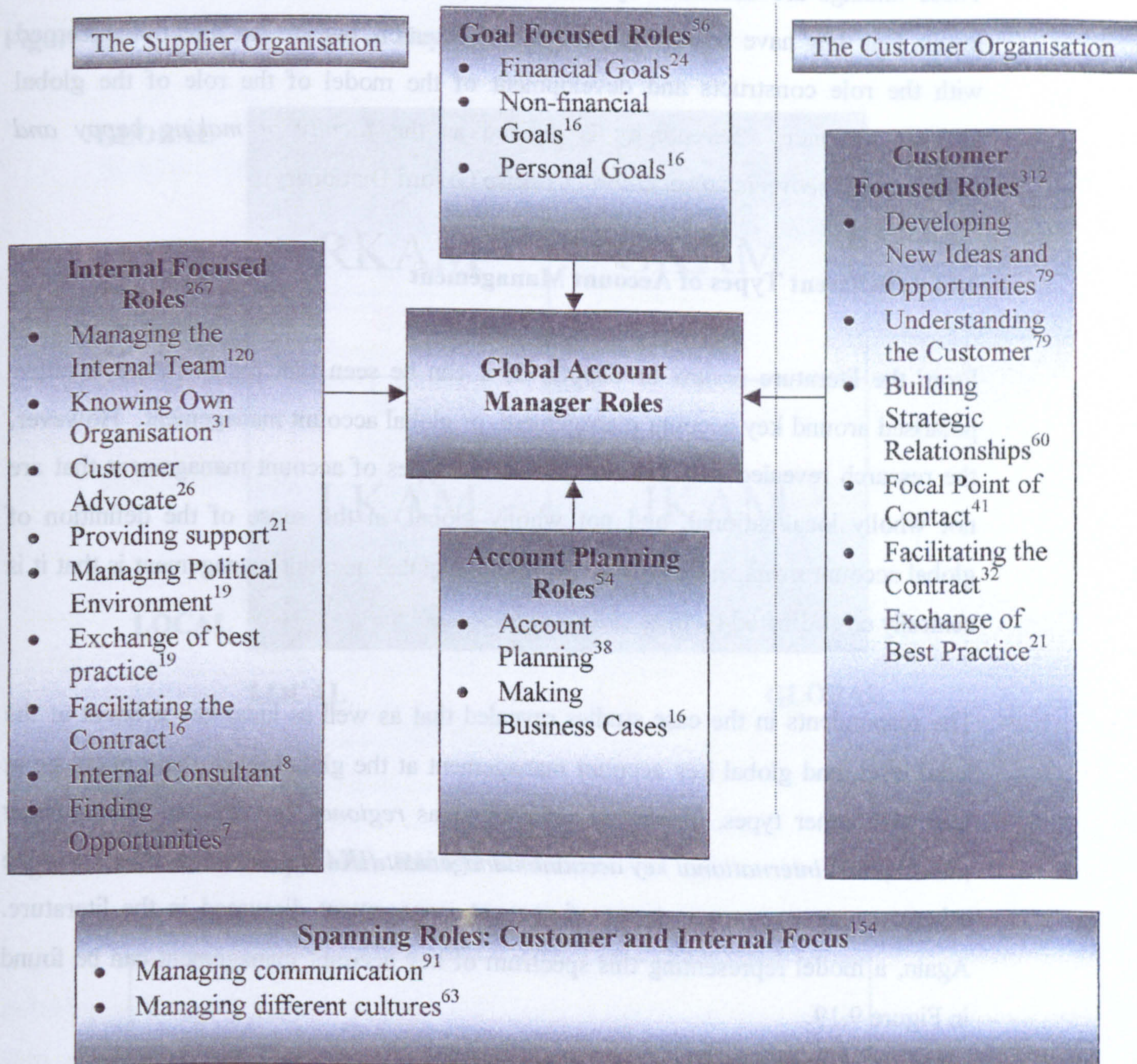
All of the constructs received a degree of support. While some are very strongly supported across all of the cases and all of the respondent groups, some constructs are supported more strongly by one case (e.g. ComponentsCo and *facilitating the contract*), or by one respondent group (e.g. the Customers and *customer advocate*). This then, represents the final set of role constructs from the data analysis.

Finally, we relate the constructs back to the original conceptual framework. From the cross-case analysis, and the analysis at individual case level, it is possible to present the model of the final set of role constructs that represent the Global Account Manager role. It is important in qualitative and case research, to relate the findings back to the original conceptual framework, so before the final model is introduced in Chapter 10, Figure 9.19 represents the data display for the role constructs as they relate to the conceptual framework. Representing the role constructs on the original framework, also allows them to be shown in terms of order and weighting from the respondents. The text unit counts for the role constructs from across the cases are given. The original conceptual framework has been modified to take into account the two spanning roles; *managing different cultures* and *managing communication*.

It was the researcher's original intention to populate the conceptual framework with the validated role constructs, and that this would represent the final output from the research project. However, the cross-case analysis and the more detailed discussion of some of the findings in paragraphs 9.9.1.to 9.9.5, has allowed the researcher to move beyond using the original conceptual framework as the final model. The original conceptual framework does not allow for some of the categorisations, linkages and underlying mechanisms between the constructs that became apparent in the cross-case analysis, to be represented. The final theoretical model of the role of the global account manager, therefore, is presented in the conclusions in Chapter 10 in Figure 10.1.

Having discussed the further findings that were identified from the cross-case research, and related the role constructs back to the original framework, some further or serendipitous (Eisenhardt 1989) findings are now discussed in the final part of this Chapter.

Figure 9.18 Final Role Constructs Against Conceptual Framework



9.11 ADDITIONAL FINDINGS

These findings are described by Eisenhardt (1989) as serendipitous findings, which means that they have been uncovered by the research, but are not directly concerned with the role constructs and development of the model of the role of the global account manager. Serendipity is defined as the *faculty of making happy and unexpected discoveries by accident* (Concise Oxford Dictionary).

9.11.1 Different Types of Account Management

From the literature review in Chapter 2, it can be seen that the literature is either polarised around key account management, or global account management. However, the research revealed that there may be other types of account management that are not wholly local/national, and not wholly global, in the sense of the definition of global account management. The definition of global account management is that it is centrally co-ordinated on both sides across the globe.

The respondents in the case studies revealed that as well as local key account at the local level, and global key account management at the global level, there might be at least two other types. These are referred to as *regional key account management (RKAM)* and *international key account management (IKAM)*, and were different to the other two more common types of account management discussed in the literature. Again, a model representing this spectrum of key account management can be found in Figure 9.19.

Companies who may not want to invest in a global account management programme, but who are increasingly wanting to manage customers on an international basis, could either go for a regional form of key account management or an international form of key account management.

Regional key account management can be a good way of organising if the customer is regionally based, for example, largely in Europe or largely in Asia Pacific. A structure for RKAM, described by one of the respondents in case study 1, as an

example of one of the ways they manage key accounts that do not qualify for global status but which are multinationals, but who themselves want to be managed on a regional basis is in Figure 9.20.

Figure 9.19 Different Types of Key Account Management

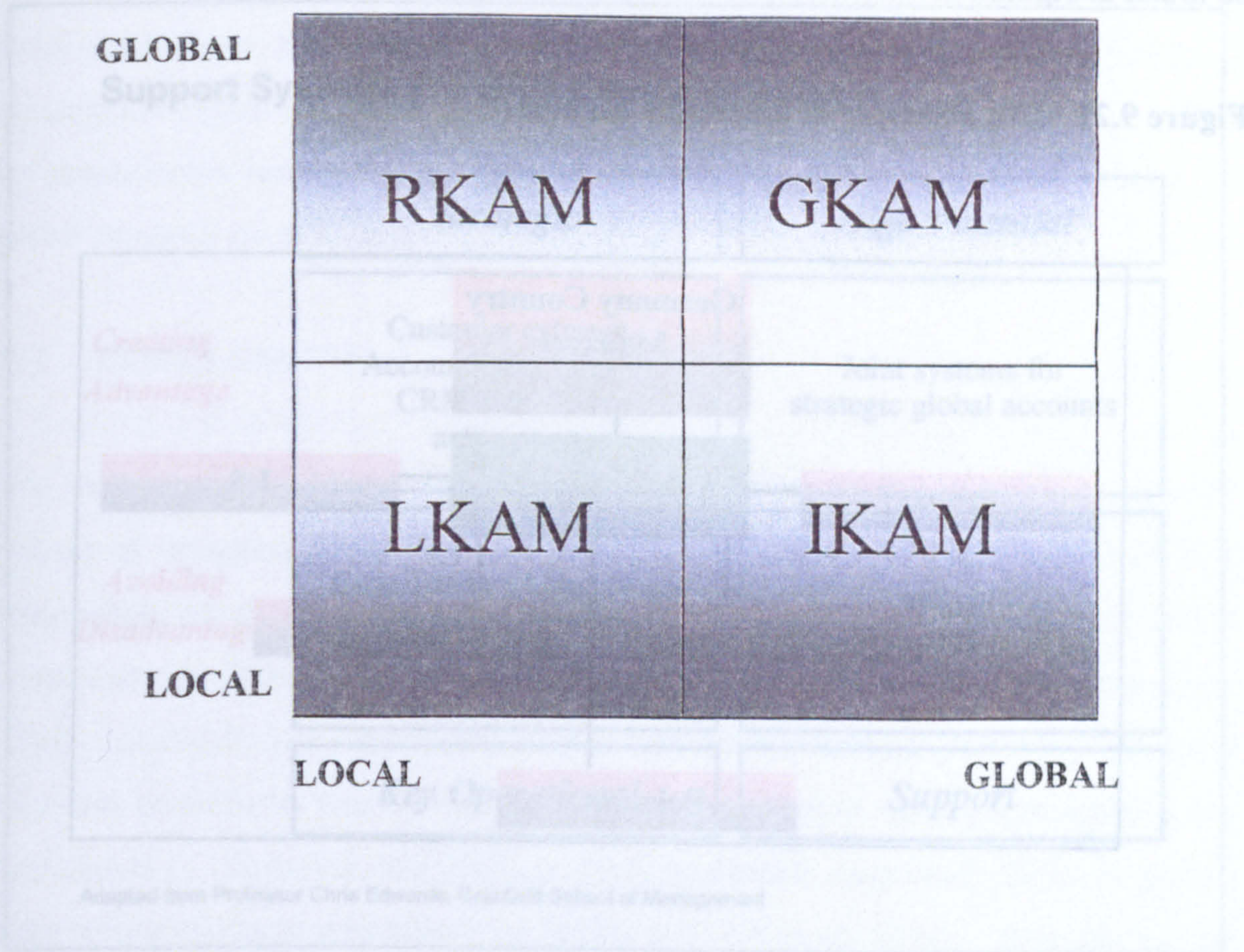
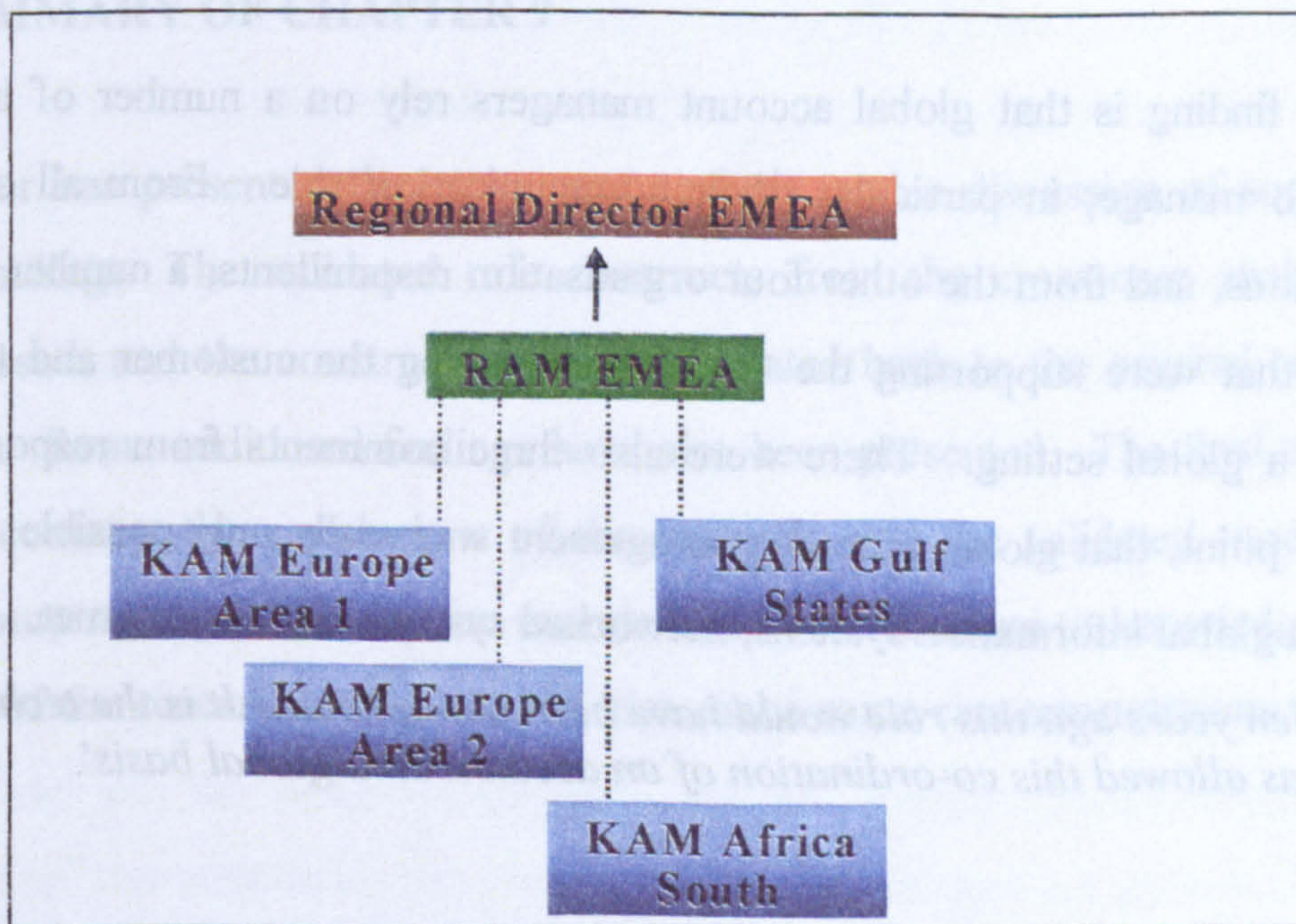
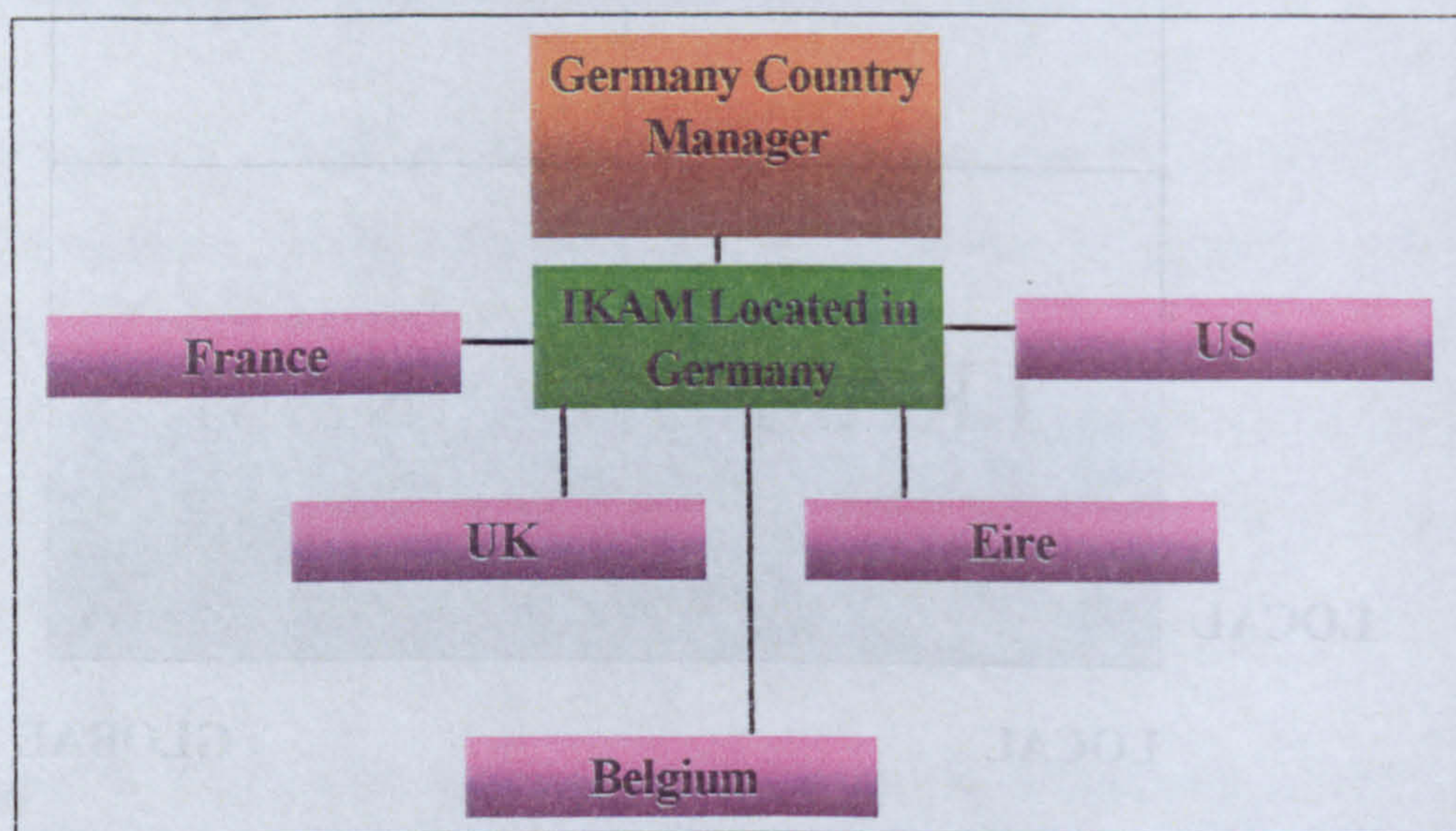


Figure 9.20 An Example of an RKAM Structure



International key account management (IKAM) is a structure that can be useful where the customer is in a few international countries, but again does not want to or does not need to be managed on a global basis. Again case study 1 offered a structure for IKAM which was centred on the IKAM being situated, like the GAM, in the most appropriate country and then travelling to the others as necessary. The structure can be found in Figure 9.21

Figure 9.21 An Example of an IKAM Structure



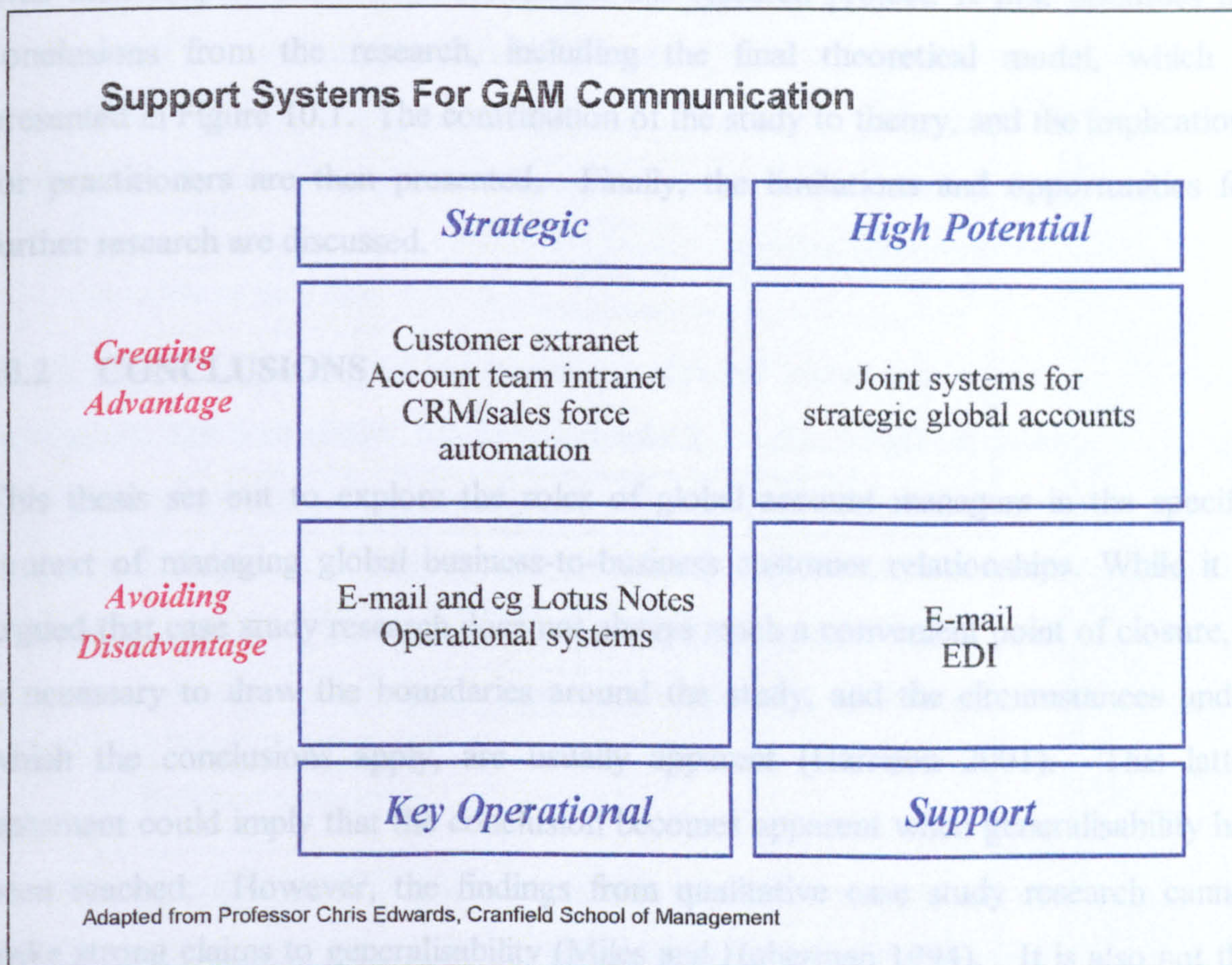
9.11.2 Global Account Manager Information and Communication Support Systems

The final finding is that global account managers rely on a number of information systems to manage, in particular, their communication role. From all of the case organisations, and from the other four organisation respondents, a number of systems emerged that were supporting the GAM in managing the customer and the internal teams in a global setting. There were also three comments from respondents that made the point, that global account management was really only possible, because of the rise in global information systems, networked systems and the internet.

'Ten years ago this role would have been unthinkable. It is the technology that has allowed this co-ordination of an account on a global basis'. Org9

The types of systems mentioned by respondents are plotted on a diagram (see Figure 9.22) used by Professor Chris Edwards, for teaching Strategic Information Systems at Cranfield School of Management.

Figure 9.22 Support Systems for GAM Communication



9.12 SUMMARY OF CHAPTER 9

This chapter has presented the cross case analysis, and a discussion of some of the research findings. The validated role constructs from the cross-case analysis have been discussed, and the constructs have been related back to the original conceptual framework. Some additional findings have also been presented. The final chapter of the thesis contains the conclusions of the research, and the validated model of the global account manager role. It then examines the contributions to knowledge and the limitations of the research study. It will also make some recommendations for future research.

CHAPTER 10: CONCLUSIONS, CONTRIBUTION AND LIMITATIONS OF THE RESEARCH

10.1 INTRODUCTION TO THE FINAL CHAPTER

This final chapter draws to a conclusion this research project. It first discusses the conclusions from the research, including the final theoretical model, which is presented in Figure 10.1. The contribution of the study to theory, and the implications for practitioners are then presented. Finally, the limitations and opportunities for further research are discussed.

10.2 CONCLUSIONS

This thesis set out to explore the roles of global account managers in the specific context of managing global business-to-business customer relationships. While it is argued that case study research does not always reach a convenient point of closure, it is necessary to draw the boundaries around the study, and the circumstances under which the conclusions apply, are usually apparent (Harrison 2001). This latter statement could imply that the conclusion becomes apparent when generalisability has been reached. However, the findings from qualitative case study research cannot make strong claims to generalisability (Miles and Huberman 1994). It is also not the role of the Realist researcher to look for statistical generalisation but to emphasise '*analytic generalisation*'; that is, theory building (Healy and Perry 1998). However, '*Realism researchers do not say that theory-testing should not be done, they merely say that theory has to be sorted out before its generalisability to a population is tested*' (Healy and Perry 1998). So, the focus of this study has been to build theory, through building a model of the role of the global account manager. Thus it is consistent epistemologically, ontologically and methodologically with the Realism philosophical paradigm.

This project has comprised a multiple case study research methodology within the Realism philosophical paradigm. The role of Realist research is to lead to an understanding of the relationships between phenomena through providing an explanation of the structures and mechanisms by which they are related (Healy and

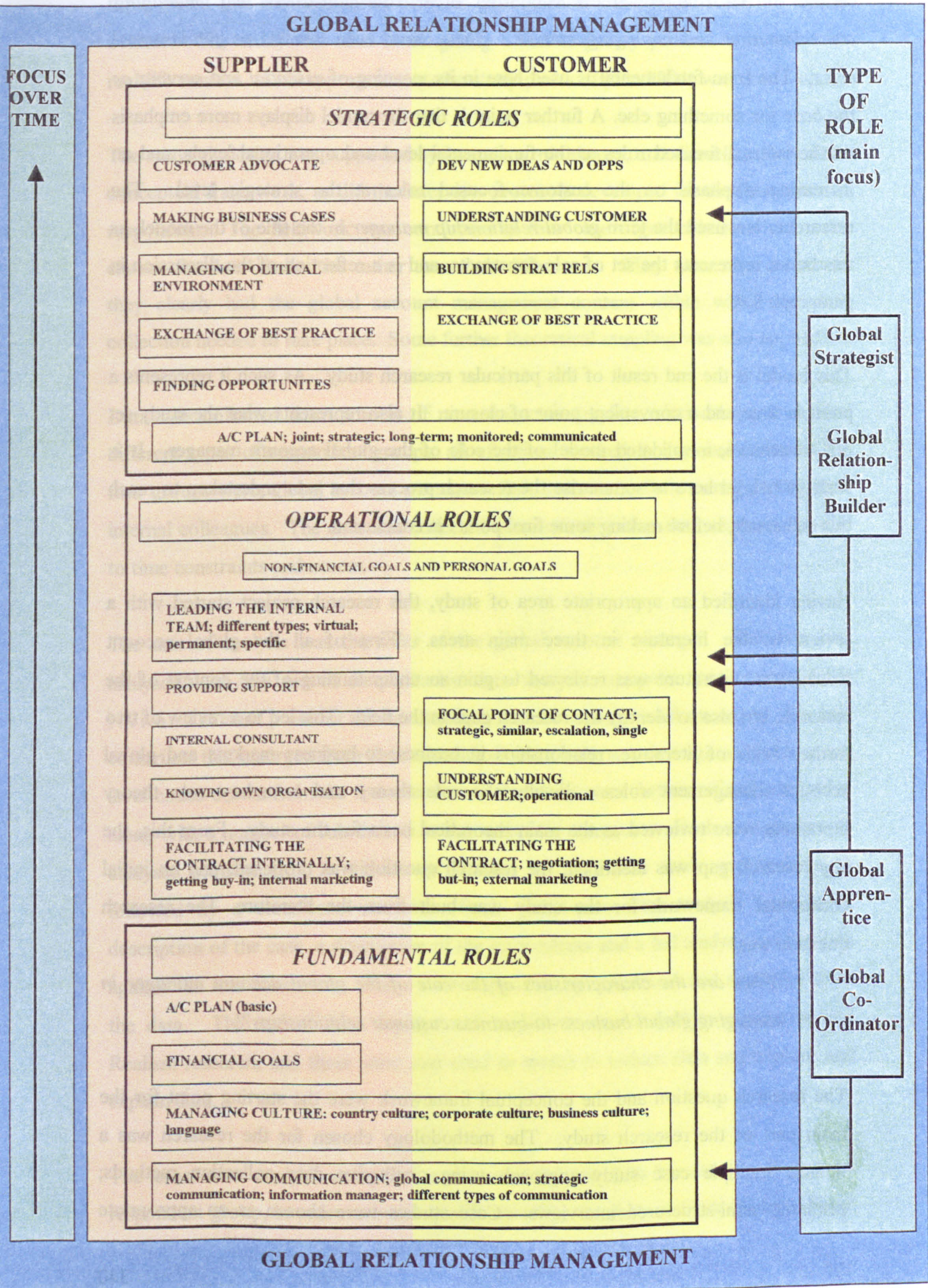
Perry 1998; Harrison 2001). This project has presented a series of structures and mechanisms in the set of validated role constructs and sub-themes. In addition, a number of findings relating to the constructs in their context and in relation to each other have been discussed in paragraph 9.9. The role of context is also important in Realism research. Healy and Perry (1998) suggest that in judging the quality of realism research that *contingent validity* is more appropriate than internal validity. They explain that contingent validity is about generative mechanisms and the contexts that make them contingent. This study has researched global account managers in their global account management context. The context is specific, therefore the study can be judged by this quality criteria.

Based on the above discussion, the role constructs are now finally presented in the theoretical model in Figure 10.1. Links between the constructs and the overall context of the work is defined in the model. From a realist philosophical position, the role of the theoretical model is to build on theory, and to extend it into a new application. The model does not claim to represent an objective truth but a closer approximation to the reality it seeks to represent within the specific context of the research.

From the cross-case analysis it has been shown that many of the role constructs have a number of different sub-themes which underpin and illustrate in more detail what the activities and the overall role are in practice. This picture of the overall role has been constructed through the process of eliciting, in the first case, the role constructs by analysing each of the case studies individually from the original set of interviews carried out with the organisation, global account manager, customer and internal team respondents. This was the inductive and exploratory stage of the data analysis.

Secondly, the analysis was refined by seeking to further analyse the data and elicit further findings and validation of the role constructs from the cross-case analysis, in order to more fully answer the research question. This allowed a further examination of the activities and a further rationalisation of the constructs. It also facilitated the emergence of some of the more specific findings in paragraphs 9.9.1.to 9.9.5. This was the deductive and explanatory stage of the data analysis.

Figure 10.1 Theoretical Model of the Role of the *Global Relationship Manager*



The model is not intended to be sequential. However, the findings revealed that certain of the role constructs supported other role constructs; e.g. *managing communication* and *managing culture*. These have been labelled as *fundamental roles*. The term fundamental is used here in its meaning of *essential* and *serving as the base* for something else. A further point is that the model displays more emphasis on the internal-focused roles at the fundamental level and operational levels, and an increasing emphasis on the customer-focused roles at the strategic level. The researcher has used the term *global relationship manager* in the title of the model, as this better represents the set of role constructs, and is a reflection of the discussion in paragraph 9.9.

This model is the end result of this particular research study. As such it represents a point in time and a convenient point of closure. It also represents what the study set out to achieve, a validated model of the role of the global account manager. It is perhaps helpful here to summarise the research process that was undertaken to reach this end result, before making some final points in conclusion.

Having identified an appropriate area of study, this research project started with a review of the literature in three main areas. First of all the global account management literature was reviewed to gain an understanding of the context of the research, but also to identify the research gaps in the field. This led to a review of two further fields of literature, relationships in business-to-business markets and global account management roles. Finally the role theory and boundary role theory literatures were reviewed as the main theoretical basis for the study. From this, the key research gap was identified, the research question was proposed, and an initial conceptual framework for the study was built from the literature. The research question was:

'What are the characteristics of the role of the global account manager in managing global business-to-business customer relationships?'

The research question and the conceptual framework were the starting point for the main part of the research study. The methodology chosen for the research was a holistic multiple case study approach using qualitative data collection methods; primarily semi-structured interviews. Case studies were chosen as an appropriate

method as they require some prior theory development, and the nature of the research topic meant that the boundaries between phenomenon and context were not clearly evident. The study was also investigating a contemporary phenomenon within its real-life context. As is appropriate, a case study protocol (Yin 1994) was drawn up.

The research design was supported by boundary role theory, and directly reflected the conceptual framework, as did the interview protocols developed for the four types of respondent. The fieldwork was conducted in four case organisations, which were chosen for their similarities rather than their differences. They were also chosen as they clearly had the global account management context within which the data collection needed to take place. Some further theoretical sampling was also applied.

Data was collected from a total of nine customer-supplier relationships from four different types of respondent groups, all of whom worked in a global context. The four groups were, global account managers, their customers, their managers and their internal colleagues. The data was collected concurrently rather than sequentially, due to time constraints and access.

The unit of analysis was the *roles* of the global account manager. The data was analysed with the aid of a qualitative data analysis computer programme, QSR NVivo. The start point for the data analysis was the conceptual framework. The role constructs that emerged from the data analysis were analysed, first against the four top level codes drawn from the framework, and then they were further refined and coded along with a number of sub-themes to the main role constructs. Each case study was analysed sequentially. A within-case analysis for each case study was undertaken followed by a cross-case analysis. Each within-case data analysis provides a description of the case, a description of the respondents and a full analysis of the data against the role constructs. These were supported by quotations and examples from the data. The use of data displays and models is encouraged in qualitative and Realism research, and these were also used as means to reduce data and explore and explain data.

The cross-case analysis compared and contrasted the data by case study and by respondent group, in order to better qualify the role constructs and sub-themes. Some

findings from the research were also discussed in more detail. The constructs were then related back to the conceptual model. The result is a series of qualified and validated set of role constructs. Originally this had been the intended end point of the research, which would have been to populate the conceptual framework as the final output and model of the research. However, the cross-case analysis revealed that this framework could be further developed and refined. Finally, the results enabled the building of a theoretical model of the role of the global account or *relationship manager*.

As already discussed, from a Realism philosophical perspective, the role of the theoretical model is to build theory, but as is consistent with the perspective, the model is not seeking to represent an objective truth but to give a closer approximation to the reality it seeks to represent. Inherent in such models are assumptions, and representations, concerning the objects and the mechanisms that may connect them.

In conclusion, the study has addressed the research question with a case study methodological approach within the Realism philosophical paradigm. Throughout the process the researcher has endeavoured to ensure the quality of the research by reference back to Yin's (1994) quality criteria for exploratory case study research, Eisenhardt's (1989) roadmap for case study research and Healy and Perry's (1998) quality criteria for case study research in the Realism paradigm.

10.3 POSITIONING THE RESEARCH

It is useful when assessing the contribution of a study to position the research in relation to other work in the field in order to differentiate the thesis. This research has carried out a study of the role of the global account manager in the context of managing global business-to-business customer relationships. Figure 10.2 explains how this work differs from other work in this field.

Figure 10.2 Positioning the Research

PREVIOUS RESEARCH	THIS RESEARCH
Conceptualised by academics	Conceptualised by managers from four different managerial groups
Largely conceptual and anecdotal	Empirically grounded
Few studies on practising managers	Sample of managers from leading global companies
Roles based on key account management and other sales roles	Roles based on direct interaction with GAMs, customers, internal team members and management in their global account management context
Supplier perspectives	Supplier and customer perspectives
Lists of unsubstantiated roles	Development of validated role constructs and theoretical model

The key contributions of the study are now presented.

10.4 CONTRIBUTION OF THE STUDY

A doctoral thesis in a management topic is expected, at Cranfield University, to be both *rigorous* in terms of its academic contribution to knowledge, and *relevant* in terms of its application to managers. The thesis must make a contribution to academic knowledge, either in terms of a contribution to theory, or a contribution to methodology, or both. In addition, a doctoral thesis in management is also expected to highlight the implications for managers that have arisen as a result of the research.

This research has built a validated model of the role of the global account manager within the context of global business-to-business relationships. This has addressed a gap in the literature that suggested that empirical research needed to be carried out in order to gain further understanding of this role.

The research has a number of differentiating characteristics, which support a claim to make a contribution to knowledge.

10.4.1 Contribution to Theory

Contribution to the field of global account management

Theory development in the field of global account management is at an early stage and little empirical research has been carried out to date. While broad conceptual roles have been outlined in the literature (Millman 1996; Millman 1999b; Millman and Wilson 2000), these have largely been built on the roles defined for key account management, which themselves have been little researched (Homberg et al. 2000). Further work was needed to understand the nature and complexity of the global account management role in its global account management context. By researching the characteristics of the role and its activities, this research has added to our theoretical knowledge of global account management, by building a theoretical model of the role of the global account manager, that is based on validated role constructs from the empirical data. Some specific examples of where the research is contributing to theory are now presented.

The Theoretical Model

It is suggested by the researcher that the theoretical model in Chapter 9 is also contributing further to the above domain, as it has built from the empirical data, a model of the role of the global account manager, that also represents some of the relationships between the role constructs. Previous conceptual work has simply produced a list of roles (e.g. Millman 1996; 1999b) which are not categorised or organised in any way. This study, by looking in-depth at the role, has not only contributed the sub-themes or characteristics of the roles, bringing a greater richness to our understanding, but it has also suggested some models for the individual role constructs and sub-themes, that could be further tested and refined. Further, it has, for the first time attempted to explore any linkages within and between the constructs that emerged from the within-case and cross-case data analysis. The model itself represents an opportunity for further theory development and testing. Finally, the researcher would argue that this is a unique way of representing the data for a marketing role, as opposed to simply listing eight or ten undifferentiated activities.

The internal-focused role

The internal part of the GAM role is also argued as a specific contribution of the study, to our understanding of these global roles. To date, it has not been possible to understand whether the time spent internally by people in such roles was purely *fire-fighting*, or whether there were legitimate internal roles for the GAMs. This study has gone some way in terms of legitimising these internal roles as being a significant part of the job. The strength of this research lies in the fact that all of the other respondent groups identified key internal activities for the GAMs. The customer group has been particularly important in identifying this internal focus. This finding alone has further contributed to the theory on key account and global account management roles.

A different role from sales

While there are references in the literature that this is a different role from sales and selling, these are largely observations and/or conjecture. This research has gone some way towards establishing that these global roles are

managerial in nature and, therefore, are more related to the management literatures than perhaps they are to the sales and selling literatures. The comments from the customer respondents again add strength to this position. This has highlighted some interesting possibilities in terms of which bodies of literature should be reviewed for future research in this area. This is discussed further in paragraph 10.7.

Support for other research

Finally, throughout the cross-case analysis, many of the findings were supporting, or confirming previous research and conceptual work with empirical data. This has been important in contributing to, and supporting existing theory in the field, particularly as it is a relatively new and under researched area. It particularly builds on, and supports the work of McDonald et al (1996, 1997) on key account management and the work of Millman and Wilson all of whom have also been pioneers in this field.

Extending Boundary Role Theory

The research has also extended the use of boundary role theory by applying it in a global relationship context. While some previous research has focused on boundary role ambiguity among sales and marketing professionals (Singh and Rhoads 1991; Singh 1993), it has been little developed further in the marketing research field, yet it is an entirely relevant theory for the study of customer-supplier relationships. The emergence of key account management and global account management as fields of study in the academic literature has presented the marketing domain with an opportunity to carry out research that takes a boundary role perspective. It has also contributed in terms of looking at a marketing role not just from the jobholder's perspective. By adopting a boundary role theory approach it has also built on our knowledge of what customers and internal teams members expect from the role.

10.4.2 Contribution to Methodology

This thesis is not claiming to make any major contribution to methodology. There are, however, two areas related to the methodology adopted, where the study has supported and extended current methods used for marketing research.

Originality of Research Design: the 360° Approach

As far as the researcher can ascertain, this is the first time that a full boundary role or 360° research design has been operationalised, in order to research a marketing or sales role. Most of the research to date has focused on the supplier perspectives of the GAM role and, in particular, how suppliers are organising and implementing GAM. A notable exception was that undertaken by Senn and Arnold (1999). However, this research was not looking at the global account management role. Certainly, the involvement of the internal team members in the research was an original approach and yielded results in the form of role constructs that would not have been identified or validated if these respondents had not been interviewed. The same argument also applies to the customer respondents. This study supports the use of this type of design, not only for researching those working in boundary roles in the marketing field, but also future research in the global and key account management fields more widely.

Realist and Case Study Approach

There have been calls for marketing research, particularly in respect to relationship marketing, to be undertaken within a Realism paradigm which should also apply a case study methodology (Carson et al. 2001; Easton 1995). This study has further supported this approach for undertaking marketing research of an exploratory nature.

10.5 IMPLICATIONS FOR PRACTITIONERS

There are a number of implications for practitioners

10.5.1 Implications for Organisations Running Global Account Management Programmes

Global account management and key account management have generated enormous interest among practitioners, not least at the Cranfield Key Account Management best practice club. This work has helped to bridge the gap between the largely conceptual basis of the work to date, and current management practice.

There are a number of implications for organisations. For managers, it provides an initial profile of the types of roles global account managers will need to adopt in managing global strategic customer relationships. The 360° approach gives insight into what customers and internal colleagues need these roles to do, rather than just the organisation's (and management's) perspective.

It also provides information that can help managers to recruit the right people to carry out the task and information that can help them train and mentor those people who are likely to be most successful at managing global accounts in complex and global business-to-business relationships.

The reinforcement that this is not a salesperson role, but requires a much broader background more akin to general management positions will have implications for the recruitment and future development of global account managers and in the planning for their succession. This also has implications for retention strategies for GAMs.

Recognising that the internal-focused role is a major part of the role also has implications for managers. This may require managers to adopt a new approach to the design of GAM jobs through to refocusing pay and reward systems.

Finally, having a more thorough knowledge of the expectations that customers and the internal team members have of the role, should lead to a better global account management practice.

10.5.2 Implications for Global Account Managers and their Teams

Those in global account management positions have long been concerned that they are spending too much time being internally focused and not enough time being externally focused. The findings from the research have legitimised this internal role.

The importance of managing the internal team, and the fact that, more widely, many GAMs still come from a salesperson position, has implications for the development of GAMs who need to have the necessary knowledge and experience to manage teams.

10.6 LIMITATIONS OF THE RESEARCH

It is conventional and desirable in a thesis to discuss the limitations of the research. The limitations that apply to this research, are those that commonly could be made of either qualitative or case study research, since it has embraced both. While the case study method allows a considerable insight in terms of richness and depth of understanding, it does require a large resource requirement in data gathering and analysis. The process of data reduction means that some richness will be lost. While the case studies have given unique insights into global account management in the organisations concerned, there have only been four case studies conducted, with only one relationship being researched in the fourth case study.

This is an in-depth qualitative interview study of a relatively small number of respondents in a few case studies. While there are no guidelines or requirements placed on the number of case studies required to validate findings, as replication is analytic rather than statistical, it is undoubtedly the case that more data would have further increased confidence in the findings. While the case studies were chosen through theoretical sampling, the fact that they were chosen limits the findings of the study to their particular contexts.

The research has also been limited by time and money. It would have been better from a research perspective to have carried out all the interviews face to face, but this was not possible in the timeframe or in terms of cost. This may have also limited the research in another way. Due to it being necessary to carry out many of the interviews by telephone, some richness may have been lost, as the researcher could not note reactions to questions, facial expressions, body language etc. It was also more difficult to build up the same rapport with the informant when not in a face-to-face situation. However well managed, the telephone interviews tended to be shorter than the face to face interviews.

The nature of global organisations means, however, that many of the informants are used to dealing with their customer or supplier and indeed their internal colleagues on a daily basis in a virtual way. As such, they are probably more used to gaining understanding, and disseminating understanding, in a way that gets the meanings

across without the non-verbal signals, that might occur in a face-to-face situation. This does raise another issue about the role of language. English was not the first language of many of the participants, so some loss of meaning may have occurred. This could also have applied to those respondents from the USA where business terminology is different. The researcher did try to ensure that respondents responses were clarified throughout the interview process.

The researcher also was in a position to influence the findings, particularly at the coding and categorisation stage of the data analysis, and in the subsequent iteration. However, care was taken to enhance the rigour of the study throughout the research process, and the final set of constructs were presented back to the respondents.

Finally, the data was qualitative data. While the use of NVivo makes it possible to count text units, this is not that same as a rigorous quantitative survey study. The text units can only serve to weight and order the constructs that emerge. They cannot be used in the same way as statistical data can be used to test internal validity. However, this type of approach was not consistent with the research question.

10.7 OPPORTUNITIES FOR FURTHER RESEARCH

This research project suggests a number of opportunities for further work. At a general level there are numerous opportunities that suggest themselves related to the further testing and confirmation of the results. The models introduced in Chapter 9, and, in particular, the validated model of GAM roles, require further testing and developing, and the role constructs identified in this qualitative study could be further tested using a more quantitative survey approach.

At the time of the initiation of the research, finding companies where the phenomena was evident was quite difficult and would have made finding a sample to undertake a survey work very difficult. Anecdotal evidence from the Cranfield KAM Club suggests that over the last three years more organisations have adopted a global account management approach, and more suppliers are driving it. This would suggest that it would now be possible to undertake survey work in the field of global account management. There is now, therefore, scope for more theory testing studies in the domain as well as further theory development.

On global account managers' themselves, there are a number of research opportunities:

What are the skills and personal qualities that GAMs need?

Alongside the role set that has been developed in this research, there exists a need for a skill set. The personal qualities of GAMs also need to be researched. Anecdotal evidence from the KAM Club and from the respondents in this study, suggests that this is another area that is of interest to practitioners. There is little in the literature so far on this topic.

How are GAMs rewarded and motivated?

As this job is very different to a traditional sales roles, much of the existing literature on rewards and motivation in the sales domain may not apply. Comments from the respondents in this study showed that this is an area with which organisations are struggling. Customers also expressed that they would like GAMs to be in place for five years. How can companies retain and motivate GAMs?

How should GAMs be developed and recruited?

Respondents in this study also suggested that it is difficult to find people to do this role. The whole area of GAM development, training and recruitment requires further research. *Succession planning* for global account management is also an issue worth exploring.

What makes a successful and effective GAM?

Having now suggested a model of GAM roles in this study, there is now scope to develop further research and research instruments that can start to test what makes GAMs successful and effective in their roles. This research could build on the boundary role approach taken in this study.

From the nature of the questions it is possible to see that there is further scope for research on the GAM role that is exploratory and explanatory, as the field is so new, but that opportunities are now arising for testing the theory.

The researcher would also suggest that the global account manager role as it has been derived in this research, is more aligned to the *global manager* role, described by Bartlett and Ghoshal (1992), than it is like a senior sales role. Therefore, there is scope to develop cross-disciplinary approaches for global account management research. Two key areas that may be of interest are the senior management/CEO roles literature, and the literature on international management and managers.

On global account management more broadly, there is still much to research. The model suggested at Figure 9.8, for example, needs further exploration, as it would appear that there are different forms of KAM and GAM that have been little researched. The whole area of how to organise for GAM, how to make GAM programmes effective, measuring the success of GAM, and implementing GAM requires further empirical research. For example, the following questions arose directly from this research study:

What structures and processes do global account management programmes need? The comment from one respondent that the GAM role was becoming

more like a *Managing Director for the Customer* rather than an MD of a Region, function, business or SBU, suggests that it may yet evolve into a role that heads up an SBU with sole responsibility for a customer rather than for a line of business or a product. Indeed, as reported earlier this did happen with the top 15 global accounts at CourierCo. This would have implications for how companies are structured in the future. This type of structure has already been suggested conceptually in the literature (Homburg et al. 2000).

- *What support systems are needed for global account management?*
Building on the model presented in paragraph 9.11.2 there is scope for research into managing information systems and other support systems for global account management and managers.

Finally, while many conceptual models have been proposed, little empirical research has been undertaken in the whole field of global account management. This area represents a tremendous scope for future research and future researchers.

10.8 POSTSCRIPT

Finally, and in conclusion, this thesis has met its objectives. The researcher set out to build a model of the role of the global account manager in managing global business-to-business markets, by taking a boundary role perspective to the research. Significant insights have been made into the characteristics of the roles in response to the research question. It has made a contribution to academic knowledge and its findings should also be relevant to practitioners.

The researcher has also met her objectives in terms of undertaking and completing the PhD. It has been a time of considerable lifestyle changes, and completing this task has probably been the single most important achievement of the researcher's working life. The learning experience has been invaluable and the researcher has learnt a lot about herself in the process as well. The researcher's Supervisor, and the wider research community at Cranfield have always been very supportive and active, and without them, the process would not have been half as enjoyable.

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APPENDICES

Appendix 1	Global Account Manager Questionnaire
Appendix 2A	Organisation Interview Protocol
Appendix 2B	Global Account Manager Interview Protocol
Appendix 2C	Customer Interview Protocol
Appendix 2D	Internal Interview Protocol
Appendix 3	Full Listing of NVivo Nodes
Appendix 4	NVivo Node Report
Appendix 5	Project Briefing Note
Appendix 6	Customer Project Briefing Note

Research Project - Global Account Management

Questionnaire for Global Account Manager

Thank you for agreeing to participate in this research project about the Global Account Manager Role.

All information from this questionnaire will be kept strictly confidential.

The questionnaire is based on your views of the relationship with your Global Account.

Thank you for completing it.

Sue Holt

May 2000

Please put a ✕ or ◊ in the box which you think is most appropriate to your situation.

Questionnaire

1 To what extent do you agree or disagree with the following statements, applied to your relationship with this customer ?

	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
"If either company (we or our customer) ever wanted to end our relationship, both companies would find it difficult and complicated to exit".		X			
"They don't monitor competitors regularly to check up on our performance".		X			
"There is a real spirit of partnership between our two companies".		X			
"Our relationship is based on mutual trust"		X			
"Our relationship is typified by an open and honest exchange of information"		X			
"Looking after this account is not just the responsibility of the Global Account Manager: both companies have set up cross-functional teams of people dedicated to meeting their needs".		X			

"Together we have planned and formally documented long-term strategies for the development of our relationship". X

"We have worked together on joint projects which have mutually benefited both parties". X

2 To what extent is there a two-way exchange of information on key aspects of business with this account ?

	Freely	Extensively	Selectively	Occasionally	Not at all
Product/Service Specifications		X			
Product/Service Development		X			
Logistics/Delivery Of Product/Service		X			
Financials					
Sales			X		
Margins					X
Other (Please specify.....)					
Marketing Research (eg Industry and Market Information)		X			
Business Plans and Strategies		X			

3 To what extent have different aspects of your standard offer been adapted to meet this account's specific needs ?

	Not at all	A little	Significantly	Quite a lot	Largely
Core Product/Service		X			
Extra or non-core				X	
Logistics or delivery				X	
Information supply				X	
Ordering				X	
Invoicing		X			
Marketing	X				
Payment/Finance				X	
Other (Please specify.....)					

Thank you

Interview Outline for Case Data Collection

Interview: {time and date}

- 1 Background to GAM Programme within {the case organisation} eg:**
 - How long has the programme been running?
 - Why was it set up?
 - How many accounts are Global Accounts?
 - How do you identify who is to be a Global Account?
 - How many Global Account Managers?
 - What is the ratio of Global Account Managers to Global Accounts?

- 2 Structure of Global Account Management within {the case organisation} eg:**
 - How is it organised?
 - What are the team structures?
 - How do they operate?
 - What are the interfaces with the customer?

- 3 Roles, Selection, training, development and reward of Global Account Managers eg:**
 - Are there job specifications and person specifications? (if these do exist, I would be grateful for copies)
 - What are their key roles for the customer?
 - What are their key roles internally?
 - What sort of person does {the case organisation} look for to fill these roles?
 - How are they selected?
 - Are there any specific training and development programmes?
 - What sort of targets do the GAMs have?
 - How are GAM's generally rewarded?
 - What makes a successful Global Account Manager?

- 4 GAM Programme documentation eg:**
 - Do {the case organisation} have specific models for GAMs to follow eg account plan guidelines or reporting/feedback guidelines?
 - Have {the case organisation} developed models for Global Account Management?

- 5 Success of the GAM Programme and its Future eg:**
 - Some estimation of how successful you think the programme has been.
 - Any plans for the future?

- 6 Any other comments or issues you would like to make about {the case organisation's} GAM programme**

Interview Outline for {name}, Global Account Manager {or other title} for {the customer} at {the case organisation}

Interview: {time and date}

1 Personal Background eg:

- How long have you been with {the case organisation}?
- What is your background?
- How long have you been a Global Account Manager?

2 General Background on the Customer eg:

- How long have they been a Global Account?
- What sort of businesses/industry are they in?
- What is their global structure or setup?
- Where are the key interfaces between {the case organisation} and {the customer}?

3 GAM Customer Focused Roles eg:

- What are the key activities you undertake with the customer directly?
- What knowledge is it important for you to have in order to carry out these activities?
- What capabilities and skills do you need for these activities?
- How is the interface largely managed (eg mixture of face-to-face and virtually)?
- How much of your time is spent directly with the customer (eg face-to-face and virtually)?

4 GAM Account Planning Roles eg:

- What sort of account planning do you do?
- How much is short-term and how much is long-term?
- What knowledge is important for account planning?
- What skills do you need?
- How much of your time is spent on these activities?

5 GAM Internal Focused Roles eg:

- What are the key activities that you undertake internally within {the case organisation}?
- What knowledge is it important for you to have in order to carry out these activities?
- What capabilities and skills do you need for these activities?
- How are the interfaces internally managed (eg mixture of face-to-face and virtually)?
- What key resources do you have that enable your activities (eg IS)?
- How do you allocate resources?
- How much of your time is spent on internal activities?

6 GAM Goal Focused Roles eg:

- What are your key responsibilities in terms of financial management of the global account (eg profit and loss)?
- What are your key goals for the account?

7 Other questions:

- How do you think you personally create value for the customer?
- What are the key challenges you face in your role?
- Do you face any cross-cultural issues?
- What do think is the profile of a successful person in the GAM role?

8 Any other key aspects of the job that you would like to highlight

**Sue Holt
Cranfield University
May 2000**

Interview Outline for the Customer Interviews

1 Personal Background eg:

- What is your role within {the customer organisation}?
- How long have you been working with {the case organisation}?
- Who are your main contacts within {the case organisation}?

2 Customer's Global Management Structure etc, eg:

- How much of your time is spent on managing the business with {the case organisation}?
- How often do you have contact with the Global Account Manager?
 - Face-to-face
 - Virtually eg telephone, e-mail etc
- What are your goals and critical success factors in the relationship with {the case organisation}?

3 Your views on the roles of a supplier's Global Account Manager eg:

- What is your expectation of the roles or key activities of a Global Account Manager in relation to {your organisation} (ie what do you expect the Global Account Manager to do for you)?
- What are the key areas of discussion you have with a Global Account Manager?
- What knowledge is it important for a supplier's Global Account Manager to have?
 - Specific knowledge - in relation to {your organisation} and {their organisation}
 - General - eg business knowledge
- What skills do you look for in a supplier's Global Account Manager?
- What, from your perspective, is the ideal person for a Global Account Manager position (ie what makes a good Global Account Manager from the customer's point of view)?
- Does the Global Account Manager role add value for you as the customer?

Interview Outline for the Internal Interviews

1 Personal Background eg:

- How long have you been working with {the case organisation}?
- What is your background?
- What is your role?
- Who are your main contacts within {the case organisation}?

2 Global Account Management eg:

- How much of your time is spent on managing the business with {the customer}?
- Who are your main contacts within {the customer}?
- What key areas of business with {the customer} are you responsible for?
- What are your goals and critical success factors in relation to {the customer}?

3 Your views on the Global Account Manager's role eg:

- How often do you have contact with the Global Account Manager?
 - Face-to-face
 - Virtually eg telephone, e-mail etc
- What does the Global Account Manager do in terms of activity in relation to you?
- Do you expect the Global Account Manager to do anything for you in your role?
- What are the key areas of discussion you have with the Global Account Manager?
- What skills do you look for in the Global Account Manager in relation to your role?
- What knowledge is it important for the Global Account Manager to have in their role?
- How do you think the Global Account Manager adds value for the customer?

FINAL NODE LISTING

Appendix 3

NVivo revision 1.2.142 Licensee: Sue Holt

Project: GAM User: Sue Holt Date: 02/03/03 - 20:42:18
 NODE LISTING

- Nodes in Set: All Nodes
- Modified: 10/02/03 - 11:47:58
- Number of Nodes: 58
- 1 Challenges for GAMs
- 2 Comments on Age
- 3 Comments on Experience
- 4 Evidence GAM Works
- 5 Key Role Descriptions
- 6 Misc Important Comments
- 7 Not Sales
- 8 Role Ambiguity
- 9 (1) /Customer Roles
- 10 (1 1) /Customer Roles/Building Strategic Relationships
- 11 (1 2) /Customer Roles/Exchange of Best Practice
- 12 (1 3) /Customer Roles/Understanding the Customer
- 13 (1 4) /Customer Roles/Knowing the Business
- 14 (1 6) /Customer Roles/New Ideas and Opps
- 15 (1 7) /Customer Roles/Facilitating the Contract
- 16 (1 8) /Customer Roles/Focal Point of Contact
- 17 (2) /Goal Roles
- 18 (2 3) /Goal Roles/Non-financial Goals
- 19 (2 4) /Goal Roles/Long Term Perspective
- 20 (2 5) /Goal Roles/Personal Goals
- 21 (2 6) /Goal Roles/Financial Goals
- 22 (2 7) /Goal Roles/Retaining Customer
- 23 (3) /Internal Roles
- 24 (3 1) /Internal Roles/Exchange of Best Practice
- 25 (3 2) /Internal Roles/Facilitating the Contract Internally
- 26 (3 3) /Internal Roles/Internal Consultant
- 27 (3 4) /Internal Roles/Finding Opportunities
- 28 (3 5) /Internal Roles/Managing Political Environment
- 29 (3 6) /Internal Roles/Managing Internal Team
- 30 (3 6 1) /Internal Roles/Managing Internal Team/Motivating the Team
- 31 (3 6 2) /Internal Roles/Managing Internal Team/Different types of Team
- 32 (3 6 7) /Internal Roles/Managing Internal Team/Managing Virtual Team
- 33 (3 7) /Internal Roles/Knowing Own Organisation
- 34 (3 8) /Internal Roles/Providing Support
- 35 (3 9) /Internal Roles/Customer Advocate
- 36 (4) /Account Planning Roles
- 37 (4 3) /Account Planning Roles/Making Business Cases
- 38 (4 6) /Account Planning Roles/Account Planning and Forecasting
- 39 (4 7) /Account Planning Roles/Use of Account Planning
- 40 (5) /Spanning Roles
- 41 (5 1) /Spanning Roles/Managing Communication
- 42 (5 1 1) /Spanning Roles/Managing Communication/Information Manager
- 43 (5 1 2) /Spanning Roles/Managing Communication/Different Communication Media
- 44 (5 1 2 1) /Spanning Roles/Managing Communication/Different Communication Media/Email
- 45 (5 1 2 2) /Spanning Roles/Managing Communication/Different Communication Media/Face to Face

- 46 (5 1 2 3) /Spanning Roles/Managing Communication/Different
Communication Media/Verbal
- 47 (5 1 2 4) /Spanning Roles/Managing Communication/Different
Communication Media/Website
- 48 (5 1 2 5) /Spanning Roles/Managing Communication/Different
Communication Media/Newsletters
- 49 (5 1 3) /Spanning Roles/Managing Communication/Strategic
Communication
- 50 (5 1 4) /Spanning Roles/Managing Communication/Establishing Global
Contacts
- 51 (5 1 5) /Spanning Roles/Managing Communication/Internal Marketing
- 52 (5 1 6) /Spanning Roles/Managing Communication/External Marketing
- 53 (5 1 7) /Spanning Roles/Managing Communication/Keeping People
Informed
- 54 (5 6) /Spanning Roles/Culture Management
- 55 (5 6 1) /Spanning Roles/Culture Management/Country Culture
- 56 (5 6 2) /Spanning Roles/Culture Management/Corporate Culture
- 57 (5 6 7) /Spanning Roles/Culture Management/Business Culture
- 58 (5 7) /Spanning Roles/Managing Complexity

NODE CODING REPORT

Node: Misc Important Comments

Modified: 12/02/03 - 18:29:17

Documents in Set: Working Set

Document 1 of 39 CustInt2~1

Passage 1 of 1 Section 0, Para 133, 58 chars.

133: I don't think we could do without a global account manager

Document 2 of 39 CustInt3~1

Passage 1 of 1 Section 0, Para 112, 239 chars.

112: *My preference in a global account manager type role as someone who I might work with would be someone that I feel like I can partner with. That there's positive benefits on both sides and liability and accountability on both sides as well*

Document 3 of 39 CustInt6~1

Passage 1 of 1 Section 0, Para 119, 178 chars.

119: *I guess my concern would be should one of those two gentleman (GAM6 or Org3 leave or something happened to either of them, it's the continuity that would be a major concern to me*

Document 4 of 39

CustInt9~1

Passage 1 of 1

Section 0, Para 88, 277 chars.

88: *The real value of this role lies in having consistent approaches, consistent answers and consistent solutions. ...I am abreast of what is happening both within [EquipmentCo] and within [the Bank] and this is a good example of the type of global relationship that you want*

to have

Document 5 of 39

GAM3

Passage 1 of 3

Section 0, Para 202, 148 chars.

202: Management backing is important - having a manager who understands that the return won't be immediate. It took nine months to get the first result'

Passage 2 of 3

Section 0, Para 204, 109 chars.

204: It takes at lease two years to build up the close relationship. You only get the trust and respect over time

Passage 3 of 3

Section 0, Para 209, 230 chars.

209: You really need to be liked by the customer. It is really more important to be valued by them than by your own organisation. It is also the case that you tend to get valued more internally if the customer is seen as valuing you

Document 6 of 39

GAM6

Passage 1 of 1

Section 0, Para 181, 250 chars.

181: What we're trying to do is to get them to feel confident with us, feel confident to talk to us and trust us and the last thing I want to do is for them to see me as the salesperson trying to sell them widgets. I want them to see me more as a partner

Document 7 of 39

GAM7

Passage 1 of 1

Section 0, Para 185, 81 chars.

185: *The one thing that would make my job even more effective? Well [pause] fairy dust*

Document 8 of 39

GAM8

Passage 1 of 1

Section 0, Para 189, 335 chars.

189: *think the role has to be a long-term situation. A global account manager who is with the company for a year and leaves and the customer is moved to another GAM - it's very hard, like starting all over again.It's a lot easier to continue to have a GAM long-term, you know, match up the GAM and the customer - it's really important*

Document 9 of 39

Internal1~3

Passage 1 of 1

Section 0, Para 69, 204 chars.

69: [the customer] values the strong team we have globally and they value my knowledge and [GAM1's] knowledge about what is going on in other countries. They really understand and value this team that we have

Document 10 of 39 Internal1~4

Passage 1 of 2 Section 0, Para 119, 264 chars.

119: I think the global co-ordination is also bringing good value to the customer because a lot of the time we find out that the customer just doesn't know their company well enough and I can tell you more [about the customer] than a lot of people in their organisation

Passage 2 of 2 Section 0, Para 132, 147 chars.

132: The main thing about the global contract is that it makes it a lot easier for the customers. Global contracts, global reporting - that helps a lot

Document 11 of 39 Internal2~3

Passage 1 of 1 Section 0, Para 134, 292 chars.

134: I don't know what your thoughts are looking at this from the third party but I can tell you that the Network

Global Account Management programme is phenomenal and it's a great programme. It gives the account the feeling that they get things done anywhere in the world by making one phonecall

Document 12 of 39 Internal3~3

Passage 1 of 1 Section 0, Para 143, 389 chars.

143: I think it takes a lot of time to get that level of trust with the customer, so I guess a point I haven't made earlier is that I think continuity of global account managers is important. I don't think you can change that position annually or whatever. I think it took two years before [GAM3] was really trusted by the customer.If it's a big customer and it's global it does take time

Document 13 of 39

Internal4~2

Passage 1 of 1 Section 0, Para 145, 254 chars.

145: I think that it is his seniority and his gravitas that makes him successful with the customer. It shows the whole account team has depth. He is representing the whole group and our brand. He gives out a strong message of what our core capabilities are

Document 14 of 39

OrgInt2

Passage 1 of 1 Section 0, Para 57, 96 chars.

57: This is not an easy job to do. It takes us years to develop the people to do this role properly

Document 15 of 39

OrgInt5

Passage 1 of 1 Section 0, Para 64, 47 chars.

64: He wants someone he can believe in and trust in

This Node codes no other documents in this set.

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The Global Account Management Role

**A Project Proposal
By Sue Holt**

May 2000

Introduction

As businesses become ever more global, some organisations are investing in Global Account Management programmes. In these organisations the Global Account Manager (GAM) is usually a senior executive who has the overall responsibility for managing a customer that is of major global strategic importance to the organisation. The GAM role involves managing the interface between their own organisation and that of the customer with a requirement to manage and meet the requirements of a number of different stakeholders on a global basis eg:

- several different people within the customer organisation
- senior management
- account management team and other internal colleagues

Objective of the Project

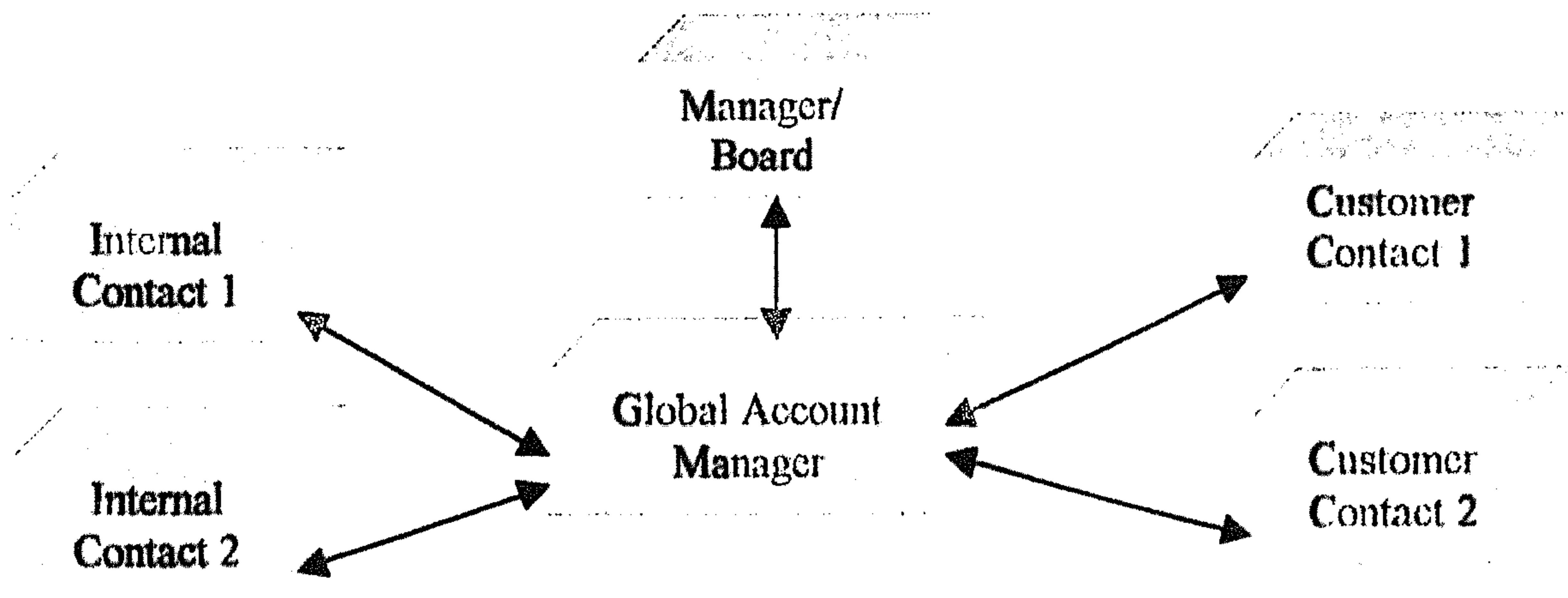
This project seeks to understand, in-depth, the different roles of GAMs and to identify the skills and knowledge that contribute to the success of GAMs in managing long-term relationships with customer organisations. The project will do this by looking at the roles from the perspectives of the GAM and of the three stakeholder groups; a 360° appraisal.

Management of the Project

The project will be managed by Sue Holt under the guidance of Professor Malcolm McDonald. Prior to her embarking on a PhD at Cranfield, Sue was a senior manager in business. She also holds an MBA.

Project Design

The project is designed round three case study organisations. For each organisation it is intended to study a maximum of four buyer-seller relationships. Each relationship is likely to be made up of a number of stakeholders as shown:



It is likely that for each relationship, between four to six interviews will need to be undertaken.

The project would involve each participant in a face-to-face or telephone interview taking a maximum of one hour. In addition, GAMs will be asked to complete a short questionnaire which will identify the type of buyer-seller relationship that exists.

The Profile of the Participating Organisation

Each organisation would need to have in place a global account management programme. They would need to have at least three global accounts where the customers were of a global and long-term strategic nature. The three case organisations will not be in the same business sector.

The Global Account Managers involved in the project will be those regarded as successful and best in their field by their own organisations.

Requirements on the Participating Organisation

Each participating organisation would need to be prepared to:

- provide job descriptions, person specifications (if these exist) and some general information on the global account programme they have implemented
- help in facilitating interviews especially with customers
- make employees available for interviews
- *optional* but welcome - a 'champion' for the research in their own organisation

Costs to the Organisation

This project would be carried out at *no cost* to the participating organisations other than their employee's time.

Proposed Timescale

It is envisaged that the project would take between four to six months to complete given participant availability.

Benefits to the Participating Organisations

The project should yield the following benefits to the participating organisation:

- an in-depth look at their global account management programme and its effectiveness
- a detailed analysis of GAM roles
- information on what their customer's actually want from the GAM and how they perceive the role in long-term relationships
- identification of which roles, skills and behaviours contribute to GAM success
- identification of areas for development which the organisation can address
- benchmarking of best practice between the participating organisations (by agreement)
- the chance to be seen as an organisation that is leading the way in best practice Global Account Management

Proposed Output from the Project for the Participating Organisations

It is envisaged that the proposed output could include:

- oral presentations of the findings to appropriate parties within each organisation; this could be to senior executives, GAMs or other staff as appropriate
- written presentations of the findings to appropriate parties

- a short summary of the findings for all participants including customers - this would be agreed with the organisation before sending it out
- workshops as appropriate

Confidentiality

All aspects of confidentiality would be discussed and agreed with each participating organisation in advance of the commencement of the project.

Points of Reassurance for Participating Organisations

Participating organisations can be assured of the following points:

- At no time will the researcher approach any customers directly without the agreement of the organisation and, in particular, of the Global Account Manager.
- Information about one organisation will not be discussed with another participating organisation without consent.
- The data collected will be analysed and presented in a way that will not allow individuals to be personally identified.
- Anything written for dissemination within the participating organisation or to customers will be cleared with the organisation first.
- The research is about the roles, skills and knowledge that GAMs need to have in carrying out their function. As they are already seen as experts in their field, this research is **not** focusing on the individual performances of GAMs (ie it is not a performance appraisal).
- It is recognised by the researcher that GAMs and their customers and colleagues are working at senior levels within their respective organisations and therefore the researcher will attempt to minimise the time and involvement of people participating in the project.

Sue Holt
May 2000

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The Global Account Management Role

Information for Participating Customer Organisations By Sue Holt

March 2001

Contact Details:

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Cranfield University Global Key Account Management Research

Cranfield University has been carrying out leading edge research projects into Key Account Management since 1995. As part of the research funded by the Cranfield Key Account Best Practice Club, we are extending our remit to the study of the emerging field of Global Account Management.

Introduction to the Project

As businesses become ever more global, some organisations are investing in Global Account Management programmes. In these organisations the Global Account Manager (GAM) is usually a senior executive who has the overall responsibility for managing a customer that is of major global strategic importance to the organisation. The GAM role involves managing the interface between their own organisation and that of the customer with a requirement to manage and meet the requirements of a number of different stakeholders on a global basis eg:

- several different people within the customer organisation
- senior management
- account management team and other internal colleagues

Objective of the Project

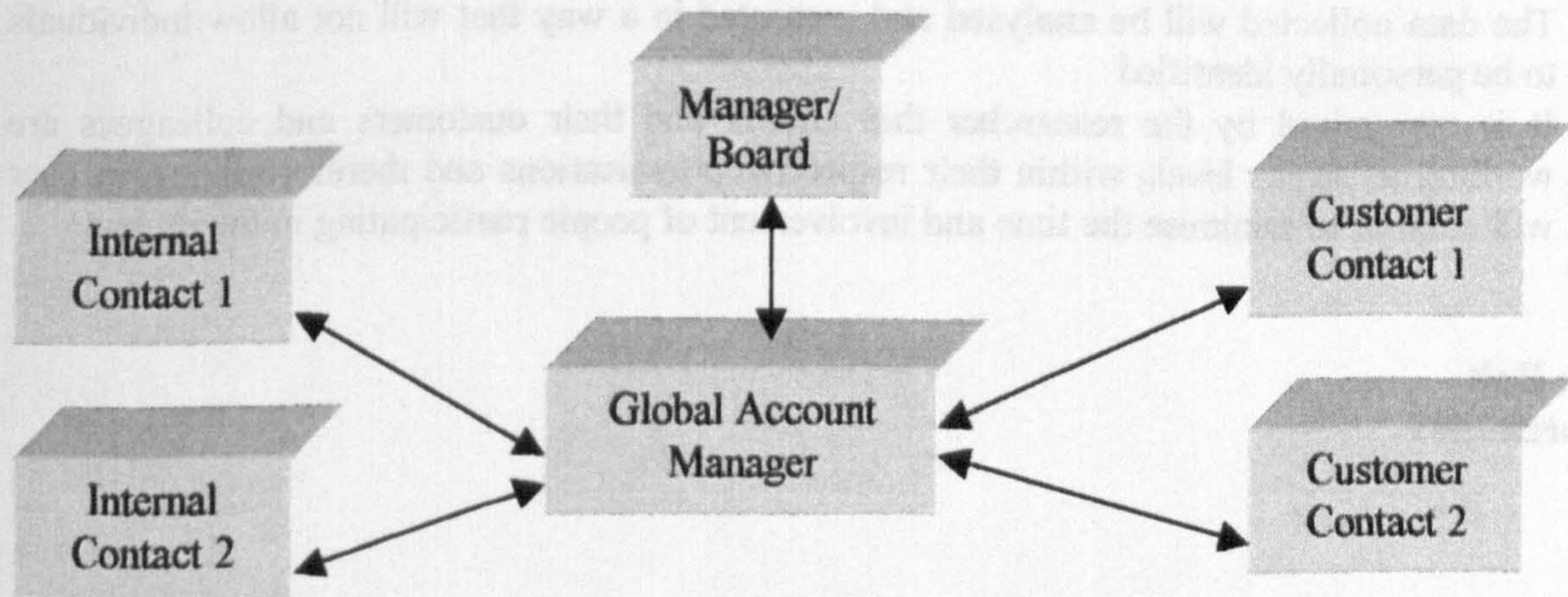
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The project will be managed by Sue Holt under the guidance of Professor Malcolm McDonald. Prior to her embarking on a PhD at Cranfield, Sue was a senior manager in business. She also holds an MBA.

Project Design

The project is designed round three case study organisations. For each organisation it is intended to study a maximum of three buyer-seller relationships. Each relationship is likely to be made up of a number of stakeholders as shown:



It is likely that for each relationship, between four to six interviews will need to be undertaken.

The Profile of the Participating Supplier Organisations

Each organisation would need to have in place a global account management programme. They would need to have at least three global accounts where the customers are of a global and long-term strategic nature. The three case organisations will not be in the same business

sector. The Global Account Managers involved in the project will be those regarded as successful and best in their field by their own organisations.

Requirements on the Participating Customer Organisations

It is hoped that each participating customer organisation would be prepared to:

- allow two people within their organisation to be interviewed either face-to-face or by telephone for about 30 minutes..

Benefits to the Participating Customer Organisations

It is hoped that the project will yield the following benefits for the participating customer organisation:

- an in-depth look at the supplier's global account management programme and its effectiveness should in turn lead to better service for the customer
- it is hoped that a detailed analysis of GAM roles from the customer's perspective will result in more customer-centred Global Account Management
- identification of areas for improvement and development which the supplier organisation can address
- the chance to be seen as an organisation that is leading the way in best practice global business relationships

Proposed Output from the Project for the Participating Customer Organisations

It is envisaged that the proposed output could include:

- a summary of the findings for all participants including customers
- presentations or workshops as appropriate possibly jointly with supplier organisation

Points of Reassurance for Participating Customer Organisations

Participating customer organisations can be assured of the following points:

- Information from one organisation will not be discussed with another participating organisation without consent
- The data collected will be analysed and presented in a way that will not allow individuals to be personally identified
- It is recognised by the researcher that GAMs and their customers and colleagues are working at senior levels within their respective organisations and therefore the researcher will attempt to minimise the time and involvement of people participating in the project

Sue Holt
March 2001