

GAMs, KAMs AND RELATIONSHIP MANAGERS

What they do and
how to find them

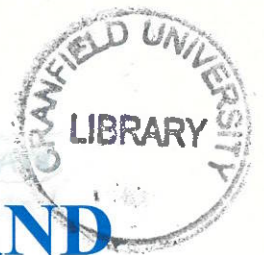


Cranfield School of Management
January 2008

Dr Iain Davies
Dr Sue Holt
Prof Lynette Ryals



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GAMs, KAMs AND RELATIONSHIP MANAGERS

What they do and how to find them

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Dr Iain Davies
Dr Sue Holt
Professor Lynette Ryals
January 2008

Previous Reports by the Cranfield KAM Club

TITLE	BY	DATE
Implementing KAM Successfully How Companies Develop Great Customer Relationships	Professor Lynette Ryals, Dr Iain Davies Lindsay Bruce	November 2006
The Measurement of KAM How Key Customers Evaluate their Suppliers	Dr Lynette Ryals Lindsay Bruce Professor Malcolm McDonald	November 2005
Managing KAM Relationships Developing High Performing KAM Managers and Teams	Dr Lynette Ryals Lindsay Bruce Professor Malcolm McDonald	September 2005
The Value of KAM Does KAM Deliver to the Bottom Line?	Dr Lynette Ryals Lindsay Bruce Professor Malcolm McDonald	March 2005
Key Customers Identifying and Implementing IT Solutions that Add Value to KAM Strategies	Peter Mouncey Professor Malcolm McDonald Dr Lynette Ryals	July 2004
Key Customer Profitability Making Money in Strategic Customer Partnerships	Diana Woodburn Dr Sue Holt Professor Malcolm McDonald	January 2004

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1 Different Key Account Manager Roles and Types

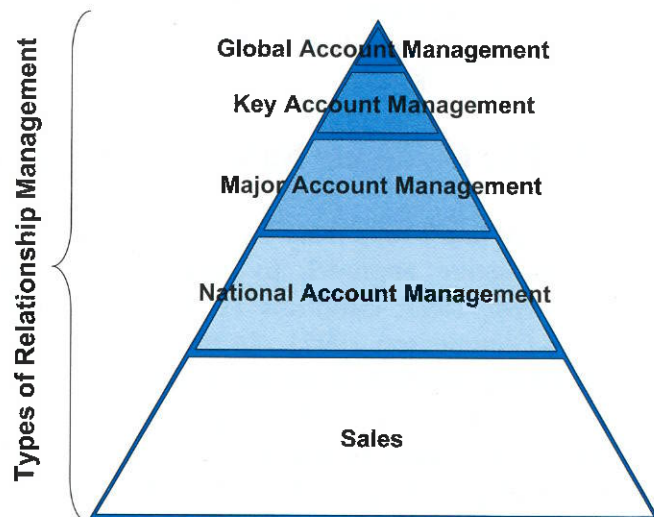
1.1 Introduction

Key Account Management (KAM) has become an increasingly important approach to managing customers for companies and organisations operating in a business-to-business marketing environment (Millman and Wilson 1995, McDonald et al. 1997). 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 KAM 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). A more recent definition emphasises the need for internal integration to manage these complex relationships, and for monitoring to ensure that they are delivered profitably: *'KAM is an integrated process for managing key accounts profitably'* (McDonald, 2000).

It is over 25 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 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'*. (Ford 1980). The idea of the relationship manager first suggested by Ford was developed and strengthened during the 1980s and 1990s.

Figure 1: The roles of relationship managers

Within the term 'relationship manager' we see a range of roles for managing different types of customer account (Figure 1). In the first instance there is sales account management, which is increasingly seen as the role of the sales function. For commercially more important accounts a more specialised relationship or account manager may be appointed, a process often referred to as regional or 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) which may answer to higher level key or global account managers. Major account management has also been identified in the literature as relating to high profile accounts which may or may not

cross international boundaries (Barrett 1986; Colletti and Tubridy 1987). However, where the customer is of considerable strategic importance, and/ or there is an international dimension to the relationship, this tends to be known as 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; McDonald et al. 2000). Key account management is a specialised form of managing customers that has gained increasing importance in business-to-business markets. Another form of this specialisation has also emerged in response to increasing globalisation; global account management (Yip and Madsen 1996; Millman 1996; Millman and Wilson 1999). Global account management refers to the management of multinational or global customers and the co-ordination of the offer across multiple national boundaries, often delivered by multiple teams. Since our interest is in the most important customers we focus on the roles towards the top of the pyramid.

However, there is some inconsistency in the way that companies and academics apply the job titles of the salespeople and account managers performing these different functions. For example, some companies refer to their key accounts as strategic accounts, and their major accounts as key accounts. In these companies, relationship managers described as 'key account managers' are in fact doing major account management. In this report, we will use the generic term 'relationship manager' to describe anyone engaged in account management, at whatever level (sales / major / key / global).

In spite of increasing interest in the topic of relationship management from academics and practitioners, little research has been done looking at the competences and skills required of relationship managers. This report builds profiles of archetypal relationship managers through a series of in-depth interviews and case studies, then uses this profile in an organisation embarking upon key account management to identify people with the work style preference and attitudes of relationship managers rather than traditional sales people. This is an important issue given the changing nature of business-to-business relationships and the emergence of relationship marketing and KAM.

1.2 The Changing Nature of Business-to-Business Relationships

Since the late 1980s there has 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, account managers and Key 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 its increased focus 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 these long-term

relationships is changing to that of a relationship manager (Weitz and Bradford 1999). Increasingly, these people are also seen as important value creators (Weitz and Bradford 1999) for customers as well as their own organisation.

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 (Wotruba 1996; Anderson 1996; Leigh and Marshall 2001) coupled with the economic imperative of customer retention (see Table 1 for the changes in personal selling styles).

Table 1: Changing Personal Selling Styles

<u>Personal Selling Styles</u>	
Transactional Focus	Relationship Focus
<ul style="list-style-type: none"> • Transactional • Commitment to customer acquisition • Motivated by obtaining orders and making sales • Rewarded on Short-term Volume • Role ends at point of sale 	<ul style="list-style-type: none"> • Relational • Commitment to customer retention • Motivated by creating strategic partnerships • Rewarded for Long-Term profitability • Role never ends

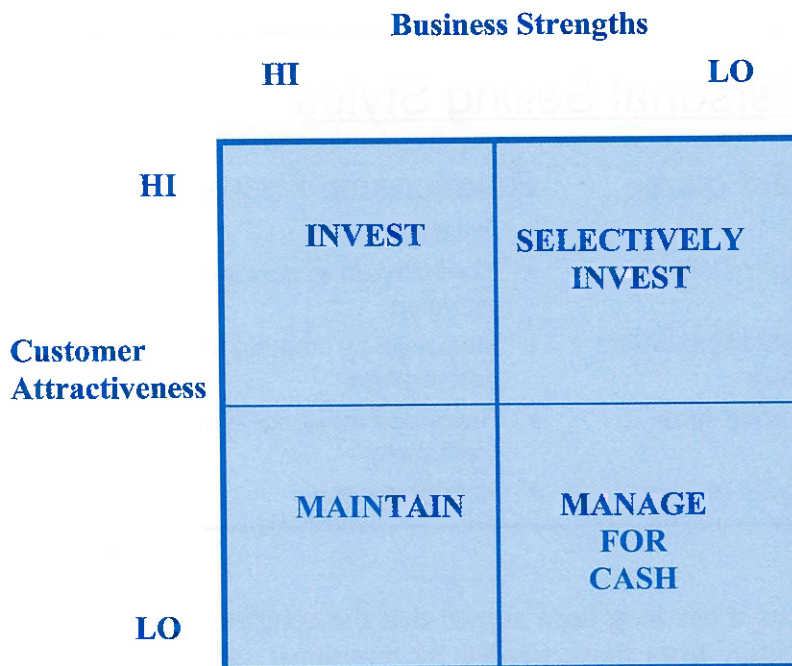
With this change in focus it has long been argued that the competences and skills of relationship managers differ from those needed by traditional salespeople (Shapiro and Moriarty 1984; McDonald et al. 1997; Millman and Wilson 1998; Weitz and Bradford 1999).

There are three distinct areas of research that have emerged during the 1990s that look at the role of the relationship manager and their competences in managing 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 Global Account Management. However, it has to be said that most of the work to date has been of a conceptual nature, with little empirical research being presented. Also, where the competences are discussed, they tend to be presented using broad general terms that do little to increase our understanding of what these people actually do. There is also a tendency to use terms that describe the competences needed for each role 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 suggests that a large part of a relationship 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 largely neglected in the literature.

1.3 A Portfolio Approach to Relationship Management

At the Cranfield KAM Club we recommend that organisations take a portfolio approach to managing their customers (Fiocca 1982; Krapfel et al 1991; Campbell and Cunningham 1983; Zolkiewski and Turnbull 2002) and, in particular, their key accounts (Millman and Wilson 1997; McDonald et al. 1997; McDonald and Woodburn 2007), to ensure that appropriate strategies can be applied to individual customers. An example of a key account portfolio is shown in Figure 2.

Figure 2: A Key Account Portfolio

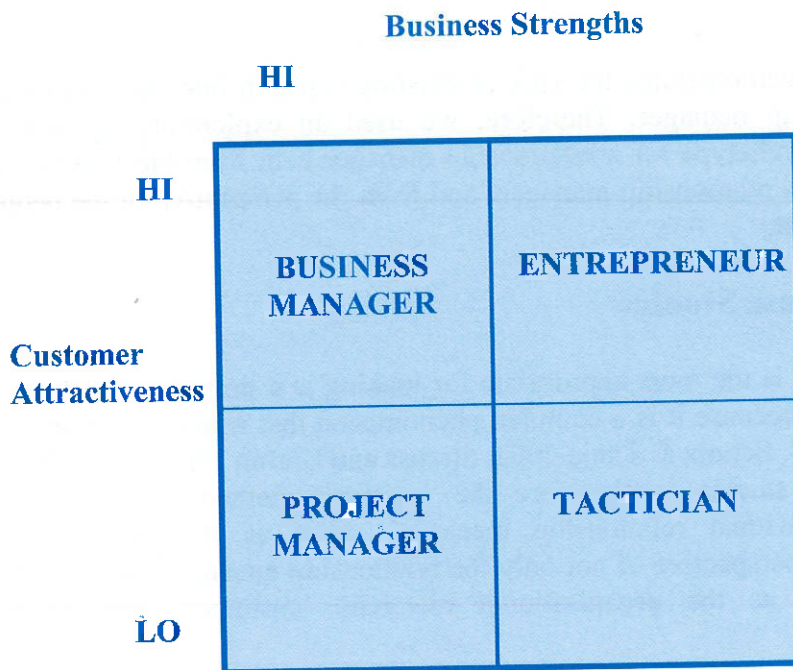


Based on Wilson 1993 and McDonald et al. 1997

The fact that customers differ in their attractiveness to the supplier and in their strength of preference for the supplier indicates that relationship managers need to adopt different approaches to managing the different types of accounts within their portfolio. Indeed McDonald and Woodburn (1999) suggest that a *'selling company's strategy for the customer and the nature of the relationship are major factors affecting the demands on the key account manager's role'*.

An example of this approach can be found in Figure 3. Where the key account is more attractive to the supplier (top half of matrix), theory suggests that the key account manager should be either a Business Manager or Entrepreneur type. Where the key account is less attractive to the supplier (lower half of the matrix), the key account manager needs to manage the relationship as a Project Manager or as a Tactician.

Figure 3: The Relationship Manager Portfolio



Based on McDonald et al. 2000 and 2007

Theory suggests that the skill levels and core competencies of the relationship manager will be different depending on what type of account they are managing. For example, the skill levels to manage an Invest account will be different to those for a Maintain for Cash account. In practice, many relationship managers will have a portfolio of customers and therefore need to understand what approaches they should take to their different customers and what competences and skill levels they require.

Figure 3 was originally developed as a conceptual model to enable Key Account Directors to match their Key Account Managers with appropriate key accounts in such a way that the management of the portfolio is optimised. However, no empirical research studies have been undertaken to support these perspectives. This study seeks to take the first step towards validating not only the competences and skills required of relationship managers but establish whether it is possible to identify individuals with the appropriate work style preference from within an existing sales force. Thus, the concept is applied not just to Key Account Managers, but to all relationship managers, to see whether it is possible to identify different types that would be best suited to managing different kinds of relationship.

2 Methodology

The literature review demonstrates the lack of existing research into the area of the role of the relationship manager. Therefore, we used an exploratory, qualitative approach to build an archetype for a relationship manager both from the experiences of individuals acting as relationship managers and from the perspective of the people with whom they interact.

2.1 Qualitative Case Studies

A case study approach is the most appropriate for looking at a portfolio of sales and relationship managers because it is a complex phenomenon that is underdeveloped in the literature (Yin 2003, Scholz & Tietje 2002, Strauss and Corbin 1998, Baker 2001). Using in-depth case studies is therefore the optimum method of gaining an understanding of individual relationship manager's roles as this provides the opportunity to get the perspective of not only the relationship manager but also other relevant parties such as the organisational hierarchy, customers and internal operations.

In selecting appropriate organisations for the case studies we were guided by three principles:

1. Each case organisation needed to be a multi-national company (supplier), operating on a global basis, with an existing Global / Key Account Management structure. 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).
2. 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.
3. 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

Four case studies were undertaken in the first phase of this study. To collect data, we used a method based on gaining the insights and experiences of a collection of individuals who are either relationship managers or significantly interact with these individuals. 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 were organised into four key groups. To fully understand the roles of the relationship manager, we collected data from the managers themselves and from their customer, line manager, and colleagues or team members.

Organisation: Group 1

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

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

Relationship Manager: Group 2

To obtain the 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: Group 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: Group 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.

From Table 2 it can be seen that the study involved some 43 individual interviews across four case organisations. In locating our four targets we also had 3 more companies who had agreed to take part but for different reasons were forced to dropout of the data collection part way through. Thus we have 4 cases plus 5 additional interviews with relationship managers (Table 2).

Table 2: Interview and Case Participants

	Courier Co.	Computer Co.	Components Co.	Equipment Co.	Other Companies	
Relationship Managers	2	3	3	1	5	14
Organisation	1	1	1	1	-	4
Customer	4	3	3	2	-	12
Internal	4	4	4	1	-	13
	11	11	11	5	5	43

The four cases were from very different industries and the names given to these cases signify the industry involved. To maintain the participants' anonymity we are unable to divulge the names of these organisations but they all had an existing relationship management programme running up to Global Account Manager level which had been in place for between one and five years.

2.2 Searching for Key Account Managers in a Major Airline

In order to gain a deep insight into the whole range of sales and relationship management functions within an organisation, the second phase of the research concentrated on a focused single case study and aimed for the highest possible response rates across all different functions. The purpose of this single further in-depth case study was to provide insight into a complete range of sales people within one company and to identify individuals who had a preferred work style suitable for KAM (Yin 2003, Scholz & Tietje 2002).

The case involved a global airline company. It was selected because it was seeking to move its Business-to-Business sales function towards Key Account Management, and because of its global reach, considerable sales force, and its willingness to give access to its entire global sales and customer management team, across all roles. The company wanted to be able to identify people who would suit key account roles.

Access to all sales functions across the organisation and around the world was achieved through their annual sales conference, which was attended by virtually all the worldwide sales workforce (over 400 individuals) accounting for all 7 of the sales functions within the organisations. Table 3 shows these roles, average years of sales experience and type of customer dealt with. Computer terminals were set up at the conference and 30 minutes was set aside per delegate in their conference schedule to partake in the research. A researcher and a translator were on hand at all times to provide assistance when required¹. This resulted in a very high response rate in the region of 70-80% (the final number of delegates actually attending the conference is unknown) and represented a significant proportion of the total sales force according to our company sponsors.

Table 3: Phase 2 Sample Statistics

Position	Sample size	Average years in sales	Type of accounts managed
Sales / Senior Sales Executive	179	7.88	Invest, Selectively invest
Sales Manager	73	13.97	Selectively invest, Maintain
Communications Executive	9	7.78	Manage for Cash
Sales Support	12	6.50	Maintain
Area Manager	57	12.04	Selectively invest, Maintain
Call Centre Manager	5	12.40	Manage for cash, Maintain
Key Account Manager	7	11.71	Invest
TOTAL	342		

Descriptive data such as years of experience in sales, job title, relative value of accounts and number of accounts etc. were gathered on the questionnaire. As the respondents were not familiar with the customer portfolio matrix (Figure 2), the questionnaire did not aim to identify the type of account they worked with. The

¹ Although the company's working language was English, as was the questionnaire, assistance was provided to delegates in three other languages.

account type was subsequently qualitatively evaluated by the two senior managers responsible for the airline's sales change programme. The final column of Table 3 indicates the type of accounts each job title dealt with.

2.3 The Survey

Both the literature and the case study data presented in this report were used to identify the areas in which attitude and approaches to sales and relationship management would differ depending on the type of customer being serviced. The survey asked questions derived from the qualitative work discussed above which would show a general progression along a continuum from transactional sales to key account management. These questions were answered by means of a 7, 8 or 9 point Likert scale dependent on the extent to which the research team and the case representatives felt a greater level of choice was required. As with other questionnaire designs, several of the statements were worded negatively and the responses then reversed during data analysis (Hague 1993, Brace 2004). This provides a check that delegates understand the questions.

As well as the Likert scale questions, attitudes and approaches were also measured through a series of questions in which respondents were asked to read four statements and identify which of the four statements most applied to them.

2.3.1 Data Analysis Procedures

The initial analysis looks descriptively at the data in relation to the roles performed by the respondents and their work style preference. This is initially compared against the expectations from both Figure 2 (section 1) and the expectations from the case study research.

2.3.2 Cluster Analysis

Cluster analysis was carried out to identify the different work style preference the organisation had as a whole. Cluster analysis is a technique for grouping instances (in this situation, people) into groups that have similar attributes (in this research, attitudes to sales and relationship management), while differing from others on these attributes.

2.4 Exploring the Clusters

An exploratory factor analysis was used to assist in understanding the clustering result. Factor analysis is a tool which takes the input variable – in this case the 28 attitudes and work style preferences of a relationship manager identified through the earlier case studies - and investigates the extent to which these characteristics “group” together into an overarching personality trait or component. The factor analysis identified 5 components: Team Working/People Management, Information Management, Market Sensitivity, Practicality and Diligence (descriptions of these appear in chapter 6).

3 Identifying the Five Roles of the Relationship Manager

This section describes the results of the first phase of case study research into the role of senior relationship managers. Through in-depth interviews we were able to identify what the relationship managers and their internal and external stakeholders envision the role of the relationship manager to be. Data are represented in a number of ways – through direct quotes, prevalent trends and also through a count of the number of times some issues were raised (the text count).

Figure 4 shows a chapter map of the constructs for the role of the relationship managers which we will follow throughout this chapter. Table 4 shows the data display of the total text count for each role construct and also the overall text unit count for each case study for each construct. A text count is a simple analysis whereby the number of times a particular issue is mentioned by interviewees is recorded and added up. Whilst text counts cannot be construed as quantitative data, they do serve to weight and order the constructs in a helpful manner.

Figure 4: Map of GAM / KAM roles

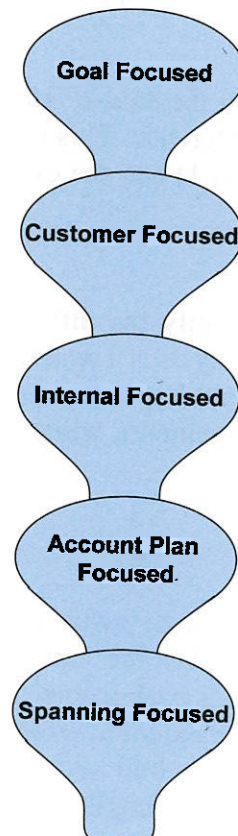


Table 4: Relationship Manager Role Constructs by Case

Role Construct	Text Unit Count	Case Study Companies			
		CourierCo 1	ComputerCo 2	ComponentCo 3	EquipmentCo 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

To assist in our discussion of the cases our analysis suggested the constructs can be presented and discussed in the following order:

- Goal-focused role constructs
- Customer-focused role constructs
- Internal-focused role constructs
- Account Planning-focused role constructs
- Spanning-focused role constructs

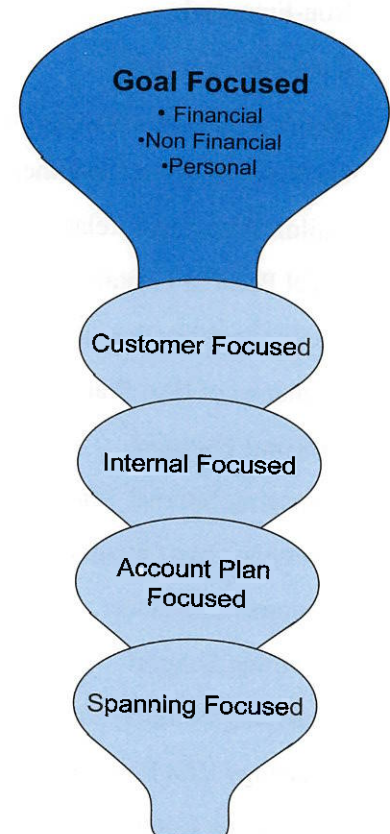
3.1 Goal-Focused Roles

The goal-focused roles were supported by comments from all the case studies. Three forms of goals emerged from the data: financial goals, non-financial goals and personal goals. These were found in all four of the first phase case studies. The personal goals were informal and not part of the way relationship managers were assessed. Unlike the formal goals, the personal goals were often related to things that the relationship manager wanted to achieve with and for the customer. However, even at the global account level of customer management, most of the formal financial and non-financial goals were set by the supplying organisation. Even where the goals were set in response to, for example, a joint project with the customer, the customer did not usually have input into setting the goals and objectives, or 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 relationship manager had performed in their role from the customer's perspective. For example, in ComputerCo's case, this related to 15% of total remuneration.

One of the additional respondents (not from the 4 initial cases) said that, as well as the usual budget goals, the relationship managers 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, an electronic data interchange project, or an e-commerce development. The relationship managers were actively encouraged to build a long-term perspective into their objectives setting.

We also identified that the goals were a mixture of longer-term and short-term goals. Some were related to strategic customer goals and others 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 internal organisation respondent's view of the relationship manager's goal-focused roles. This was expressed in terms of 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 customers was suggested by Millman (1996) as one of the key relationship manager roles/ responsibilities. Although this was supported in the current research, none of the relationship managers had taken on full P&L responsibility for their customers, demonstrating a mismatch between expectations and reality. Subsequently, CourierCo, following a change in their structure, did give the top fifteen relationship managers full accountability for profit and loss.

In contrast to their colleagues, the relationship managers expressed their goal-focused roles far more in terms of achieving or meeting financial targets. Some also described them as their key performance indicators or KPIs, particularly in relation to their non-financial goals. However, the relationship managers talked far more about the non-financial and personal goals, indicating a relationship focus in addition to their financial awareness.

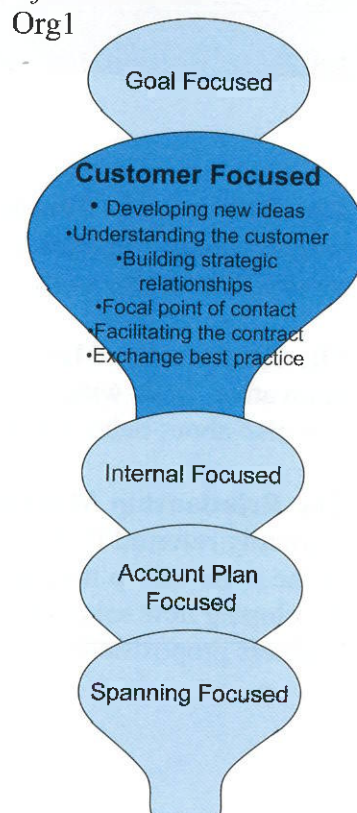
Goals have an important impact on the relationship manager's role because they set their overall focus and they help the relationship managers and the organisation to think in terms of a strategic relationship over the longer term (relationship marketing) rather than in terms of short-term tactics. This 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'.

Relationship managers have to be heavily goal orientated in their roles, and work to targets which are not just financial. They can also have informal goals that reward relationship managers through customer satisfaction, encouraging the relationship managers see their roles as highly customer-focused.

3.2 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 unit 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.

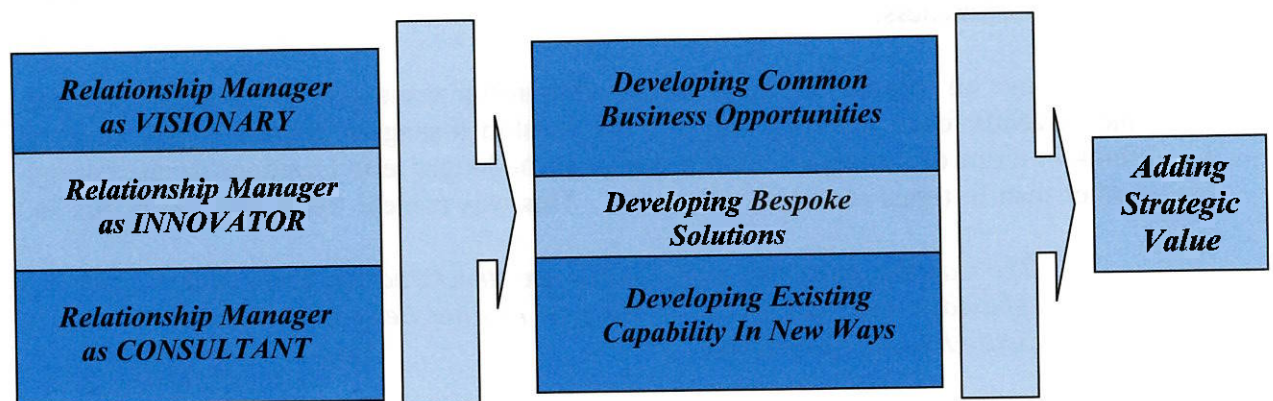


3.2.1 Developing New Ideas and Opportunities

Developing new ideas and opportunities, along with understanding the customer, were the most mentioned customer-focused role constructs across all four cases (79 text units each). Developing new ideas and opportunities 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 relationship manager 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 thus support this aspect of Millman and Wilson's conceptual role.

There were three sub-themes to the Developing New Ideas and Opportunities construct: relationship managers as visionaries, innovators, and consultants (Figure 5).

Figure 5: Model for Developing New Ideas and Opportunities



The Relationship Manager as Visionary was about them acting as a catalyst, moving things forward for the customer's organisation, not simply delivering the service. It was also expressed as being like a crusader, and being proactive.

The Relationship Manager as Innovator was about the relationship manager being innovative, both with existing capability, and about new ideas and opportunities. It was also about being creative.

The Relationship Manager as Consultant: A number of the relationship managers explicitly referred to themselves in this role, as acting as a consultant to the customer in the relationship manager role. In this role they saw themselves as identifying and developing new solutions, floating ideas, researching ideas and building proposals and 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. The characteristics he describes for this role are broadly similar to some of the sub-themes described by the case respondents. 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 relationship manager. This role, to date, is not referred to at all in the relationship management literature.

Within their roles relationship managers were expected to fulfil three functions:

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.

Ultimately, it is in these three areas that customers see the relationship manager added strategic value for their organisations:

Adding Strategic Value: customers, in particular, stressed that what they were looking for in terms of where the relationship manager role added value for them, was in bringing together the ideas and opportunities with the customer that were of strategic value.

One final aspect to emerge from the cross-case analysis was that Developing New Ideas and Opportunities is likely to be more important and strategic in those cases where the customer relationship had been established for a period of time. For example, where the relationship 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 relationships had only been formally established for a year.

3.2.2 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 relationship

manager needs to have an in-depth understanding of the customer but emphasises 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”. The comments underpinning this construct suggest that understanding the customer is a complex and multi-faceted construct.

Comments from the respondents across the case studies suggested a number of sub-themes (Figure 6).

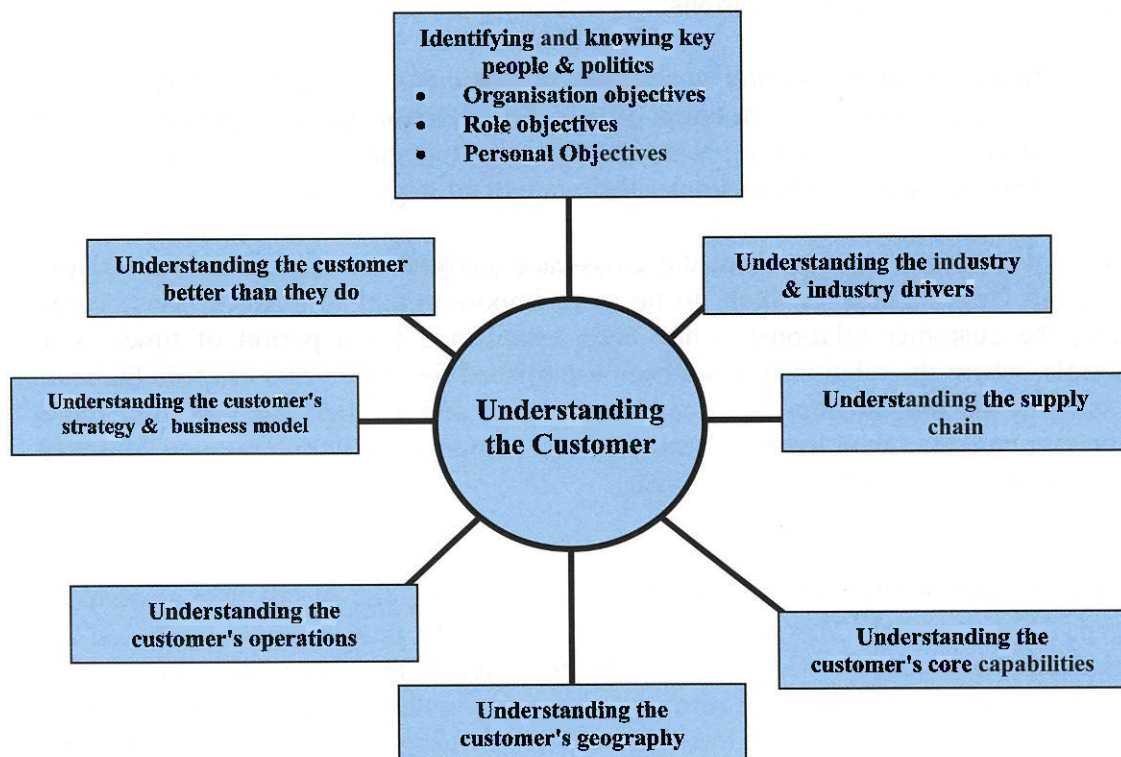
Identifying and understanding key people and politics: was about knowing all the key people involved in the relationship in the customer's organisation, not just in terms of their position and job responsibility, but also ‘what makes them tick’. This was expressed as needing to understand what a key 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 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 6: Understanding the Customer



Understanding the industry and industry drivers was expressed as having an in-depth knowledge of the competitive landscape, emerging technologies, political pressures and changes in the environment. Identifying and understanding the customer's key industry drivers was also seen as a requirement, as was understanding the supply chain.

In addition, relationship managers needed to understand the customer's core capabilities in order to leverage the capabilities of the customer and to understand and identify how the supplier's organisation could match and enhance the customer's capabilities / core competencies. They also had to understand the customer's strategy and business model, their business principles, who their customers were, and the customer's strategy and strategic direction. Having a global perspective on the customer and taking a holistic view of the customer were also stressed as important by respondents.

Both customers and relationship managers said that the relationship managers were often in a position to know and understand the customer's organisation more broadly than the customer contact did. Customers welcomed this as a way for the relationship manager to add considerable value through access to parts of the customer's organisation that the customer contact didn't have. Another comment was that the relationship manager should almost be thinking they are employed by the customer.

Understanding the customer's operations and services in-depth was seen as particularly important for the relationship manager to identify where there were possibilities for developing the business, new ideas and opportunities.

3.2.3 Building Strategic Relationships

Building strategic relationships was seen across all four case studies as a significant part of the relationship manager 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 building strategic relationships in terms of developing co-operation and acting as a business partner. Millman (1999b) lists relationship builder/ facilitator as one of his suggested 8 relationship manager 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'. Our research further supports and extends these suggestions and models with empirical findings. A model of building strategic relationships is shown in Figure 7.

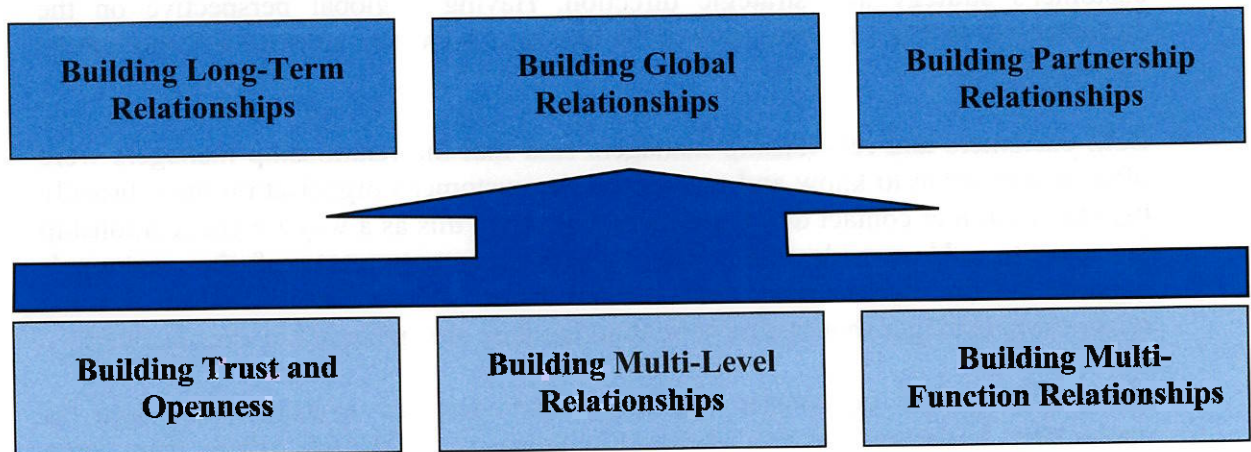
Sub-themes of this role expressed by respondents include building trust, building multi-level relationships, and building multi-functional relationships.

Building trust and openness was seen as a requirement by the respondents, but it was also something which took time. Respondents talked about becoming personal

friends where the relationship with key contacts was extremely close. Phrases like 'being in a marriage' were used to describe the type of relationship that needed to exist.

Building multi-level relationships was about the need to build at the senior levels of the customer's organisation and to facilitate multi-level relationships between different levels of people in each organisation, from the top (Board to Board), down to the day to day operational relationships necessary to manage the business.

Figure 7: A Model for Building Strategic Relationships



Building multi-functional relationships within the customer's organisation was tied in with facilitation and role of the relationship manager in facilitating the internal team. Other points about building a relationship included building global, long-term, and partnership relationships. Relationship managers 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. Long-term relationships were 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 relationship manager setting the strategy for the account and building the relationship at that level, taking the longer term view of the relationship, and developing good senior level relationships where they did not currently exist. The strategic nature of relationship building for key account relationships has been little discussed in the literature. In addition, a number of the respondents talked about building a partnership relationship based on trust and openness.

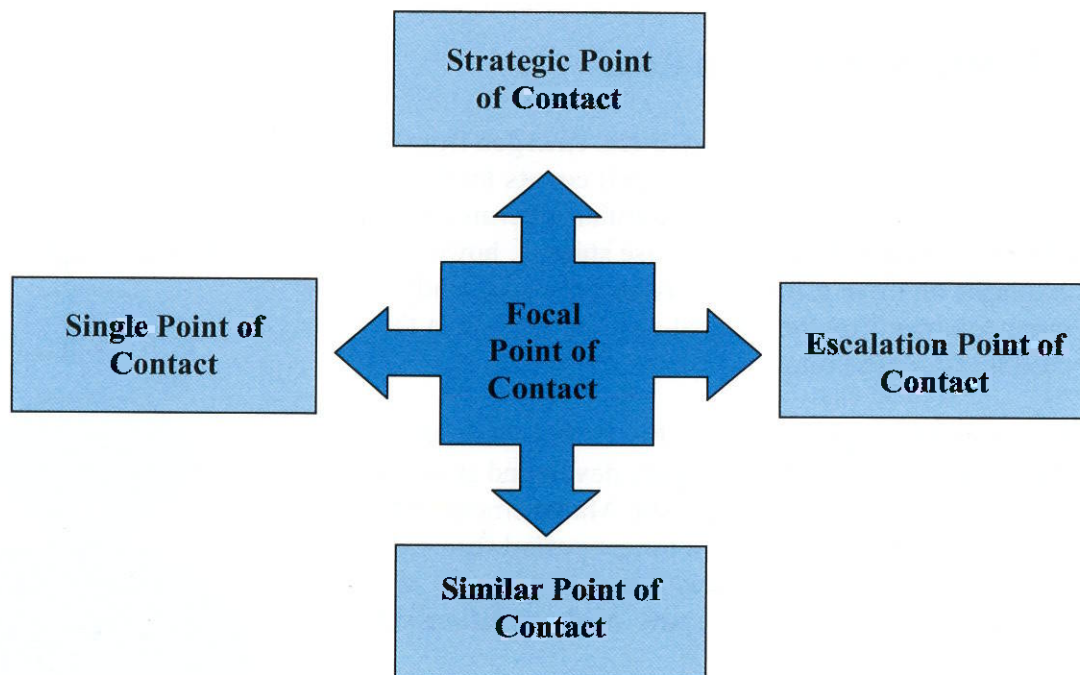
The achievement by the relationship manager of the top three sub-themes is, in part, reliant on the relationship manager first achieving the bottom three sub-themes. It is unlikely that the relationship manager can build long-term, global and partnership relationships if openness and trust is not evident 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. For global account management, it is suggested that without the multi-level, multi-function relations between customer and supplier, it is unlikely that a global relationship could exist.

3.2.4 Focal Point of Contact

This role construct was identified in all four case studies (41 text units). Customer respondents across all four cases saw this as a fundamental role for the relationship manager. This role goes right back in the literature to 1980 when David Ford suggested that there was a role for a relationship manager who was the main contact person for the client company. The focal point of contact may involve single, similar, strategic, and escalation contact (Figure 8).

Single point of contact is where customers wanted a main or focal point of contact, particularly important in a global context. **Similar point of contact** was an interesting point about the customer looking for a point of contact that they felt comfortable with. **Strategic point of contact** meant that some customers recognised that the relationship manager couldn't be the main contact at all levels of operation in a global relationship as it was not physically possible. **Escalation point of contact** was linked with being the strategic point of contact, and the role for the relationship manager in being a vehicle for problem solving when necessary.

Figure 8: The Focal Point of Contact Role



3.2.5 Facilitating the Contract

This role construct (32 text units) has not been discussed in the literature. This was the point that just having a contract or agreement does not mean that everyone in both organisations is signed up to it. Respondents identified a significant role for the relationship manager in getting the local level people in the customer's organisation to know, understand and use the agreement, bringing the contract to life and getting buy-in in the customer's organisation. This role was also about the strategic negotiation of the agreement or contract. The key sub-themes were:

- Strategic negotiation of the agreement
- Getting buy-in to the global/ service level agreement (at all levels in the customer) in terms of :
 - Hard Issues: operation, service delivery
 - Soft Issues: getting people on board, building trust etc
- Marketing the agreement (in the customer organisation)

3.2.6 Managing the Exchange of Best Practice

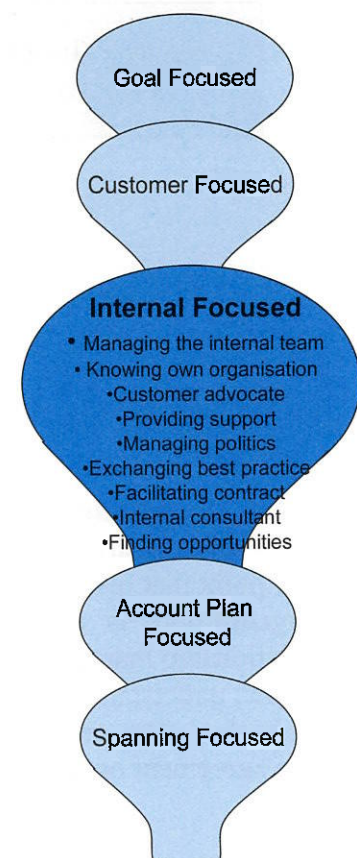
This was something that relationship managers (10 text units) and the customers (8 text units) saw as a role for the relationship manager. Millman and Wilson (2000) also describe a possible role for the relationship manager in 'identifying/transferring expertise and exploiting opportunities'. Our empirical research supports their suggestion. Respondents expressed the view that relationship managers should look for opportunities to exchange best practice from both organisations and seek opportunities for inter-organisational learning. It was recognised that the relationship manager was in a unique position to identify best practice in three areas, from the customer, supplier and other customers, and to offer it to the customer organisation where appropriate.

3.3 Internally Focused Roles

Nine internal-focused role constructs emerged from the analysis. 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 CourierCo, the company in case 1, had highly developed systems and processes for Key Account Management, had been managing accounts for a longer period than case studies 2 and 3, and was very aware of the significance of the internal part of the relationship manager's role.

While the customer-focused role constructs showed a great deal of congruence across the case studies and respondent groups, this was not the same 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 is that internal-focused roles are less well defined and articulated than customer-focused roles. This could be due to the fact that, historically, sales roles are described in terms of purely customer-



focused activities. Based on evidence from all four case studies, we assert that the relationship manager role is fundamentally a different role from sales due to the many internal roles such as team management and leadership.

3.3.1 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, not just by the relationship managers (57 text units) but was, surprisingly, the most mentioned construct (along with managing communication), by the customers (28 text units).

The requirement for the relationship manager to be a team leader has been suggested by Millman (1999b), although he does not explain the role further. The cross-case analysis from this research firmly supports and extends Millman's conceptual role. Team leadership emerged as one of the key aspects of the job of the relationship manager. 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.

It is evident from the case studies that relationship management is not about selling, but about managing established customer relationships. Therefore 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. There are a number of sub-themes to this role that are worth exploring.

- Managing and leading the team
- Motivating the team
- Developing the internal team

Managing and Leading the Team - The overall role of the relationship manager in managing the internal team was described as managing, leading, or co-ordinating the team. These terms were generally used interchangeably, although there was a tendency for the term managing to be used more frequently in those relationships that were at an earlier stage of implementation. Those at a more sophisticated level of account management tended to talk far more in terms of the relationship manager being a leader of the team and co-ordinating or giving direction rather than actively managing. Displaying leadership was seen as particularly necessary where the relationship manager had little control or direct authority over those charged with the local implementation of global strategy.

- **Leading the Virtual Team** - Most relationship managers reported that the teams they had to manage and/or lead did not report directly to them but was a dotted line or indirect relationship. Many of the respondents described their teams as virtual on the grounds of geography, reporting structure, or time. By 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 rarely met as

a physical team in one location. Moreover, the team often did not report into one singular individual, group, function, country or region. It was only a team as a result of the requirement to pull together all those involved in servicing the customer. In terms of time, many members of the team operated in different time zones. Some of the relationship managers said one way they managed this situation was to change the times of weekly team telephone conference calls, so that the team members took it in turns to be the ones to get up at 2 in the morning.

- **Leading Different Types of Team** - Another finding was that the relationship manager 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. Such teams could be comprised of regional and national account managers and customer service people, who were all responsible for certain aspects of contact with the customer. A relationship manager might also be leading the team responsible for delivering the promise for the customer, including those involved in manufacturing, operation or logistics. 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 teams were usually temporary, disbanding once the project or task had been completed. Alternatively, the team could be a more or less permanent team formed by the relationship manager, or the organisation, to manage the customer.

Motivating the Team - Relationship managers were also responsible for motivating the team, building good personal relationships, celebrating success, and conducting team building activities. Keeping in touch was also important because of the virtual nature of many of the teams. The relationship managers needed to keep people motivated even if they rarely saw them face-to-face.

Developing the Internal Team - Developing the internal team was closely linked to managing the internal team but is a role not mentioned in the literature to date. It 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 relationship manager into a relationship manager role for succession purposes. For case study three, who had been engaged in relationship 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.

Relationship managers might also be involved in teams involving customers, some of which were led by the customer organisation. In these cases, relationship managers did not necessarily lead the teams, but they did participate. In addition, customers were sometimes involved in supplier-led team initiatives.

3.3.2 Knowing Your Own Organisation

The requirement for the relationship manager 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 managing the internal team. Certainly, the relationship managers as a group had a good knowledge and understanding of their organisations, which was supported by the tenure many of them had in their own organisations. The relationship managers' tenure in the first phase of case studies ranged from two to over 20 years with an average of 9.8 years.

Many respondents expressed the view that, while it was possible to recruit relationship managers from outside their own organisation, it took them longer to be effective because it took them time to get to know the organisation. Until they did, 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.

3.3.3 Customer Advocate

The customer advocate role construct was more important for customers (21 text counts) than for relationship managers (5 text counts). 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'. The term customer advocate was used by Wotruba (1996) when he was looking at the future role of sales. Millman and Wilson (1995) suggested that one of the roles of a Key Account Manager was that of the 'customer's advocate/friend'. Corcoran et al. (1995) described this role as 'going in to bat for the customer'.

The customer respondents saw the role as the relationship manager championing their requirements back in the supplier organisation, representing their interests or fighting their corner with senior management. They expected the relationship managers to present the customer's strategies to senior management and to articulate the customer's requirements at that level. This might also involve making a specific business case on the customer's behalf. The relationship managers themselves expressed this role as 'they look to me as a potential opportunity to influence our people internally'.

3.3.4 Providing Support

Only the internal team members across all four case studies thought that providing support to the internal team members was a role for the relationship manager. This construct has not been identified thus far in the literature, but it could be argued that it 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 relationship manager role. This is the first time that internal team members' views on the relationship manager role have been obtained.

This role is about the relationship managers opening doors internally and removing obstacles that are getting in the way of the internal people carrying out their roles effectively. Three sub-themes emerged in terms of support for team members from the relationship manager: support in doing their job, support in leveraging senior

management, and support in providing contacts. Part of the relationship manager's role is to provide information, knowledge etc that can help a local manager, for example, to build closer relationships with the customer at local level. Moreover, the relationship manager was in a position to raise issues with the local person's manager if they were having problems, and also to highlight successes and give visibility to the achievements of the internal respondent. Finally, people on the team did not necessarily know whom to contact in other parts of the world and the relationship manager was in a position to help them make links and contacts.

3.3.5 Managing the Political Environment

Managing the political environment was mentioned in all four case studies, and was particularly a role stressed by the relationship managers (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 relationship manager 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 relationship manager to be aware of the internal political environment was suggested by Millman and Wilson (2000), who described the role of the relationship manager as being that of the political entrepreneur. Whilst this role construct is evident from the case studies, the data do not support the emphasis given to this role by Millman and Wilson (2000). However, the notion that the relationship manager 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 the 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 relationship managers.

3.3.6 Exchange of Best Practice Internally

The exchange of best practice internally as a relationship manager 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 relationship manager in terms of managing and facilitating the exchange of best practice and learning. This was a construct almost exclusively mentioned by two respondent groups, the relationship managers and the internal group. It was expressed as adapting ideas from other parts of the organisation.

3.3.7 Facilitating the Contract

Facilitating the contract was mentioned by all the respondent groups. Again, whilst 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). This internal role is about making sure all the supplier interfaces at regional and local level internally are 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.

3.3.8 Being an Internal Consultant

It emerged from three of the case studies that the relationship manager also needed to be an internal consultant. However, it was a construct only talked about by the relationship manager respondents. They talked about having to ensure proper routines were in place where there were critical areas of service and that the organisation would need them to be an internal consultant to move new ideas and processes forward.

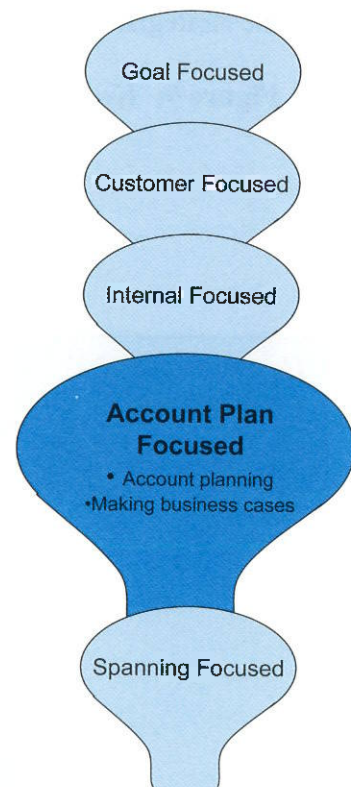
3.3.9 Finding Opportunities

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. Team members had an expectation that the relationship managers would find opportunities for them to increase their business locally and to offer new products and services.

3.4 The Account Planning Roles

There was a lot of 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 relationship managers (31 text counts). Looking at the proportion of time spent by relationship managers on these activities may explain why. Seven out of the nine relationship managers 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 relationship managers would spend at least 10% of their time on account planning.

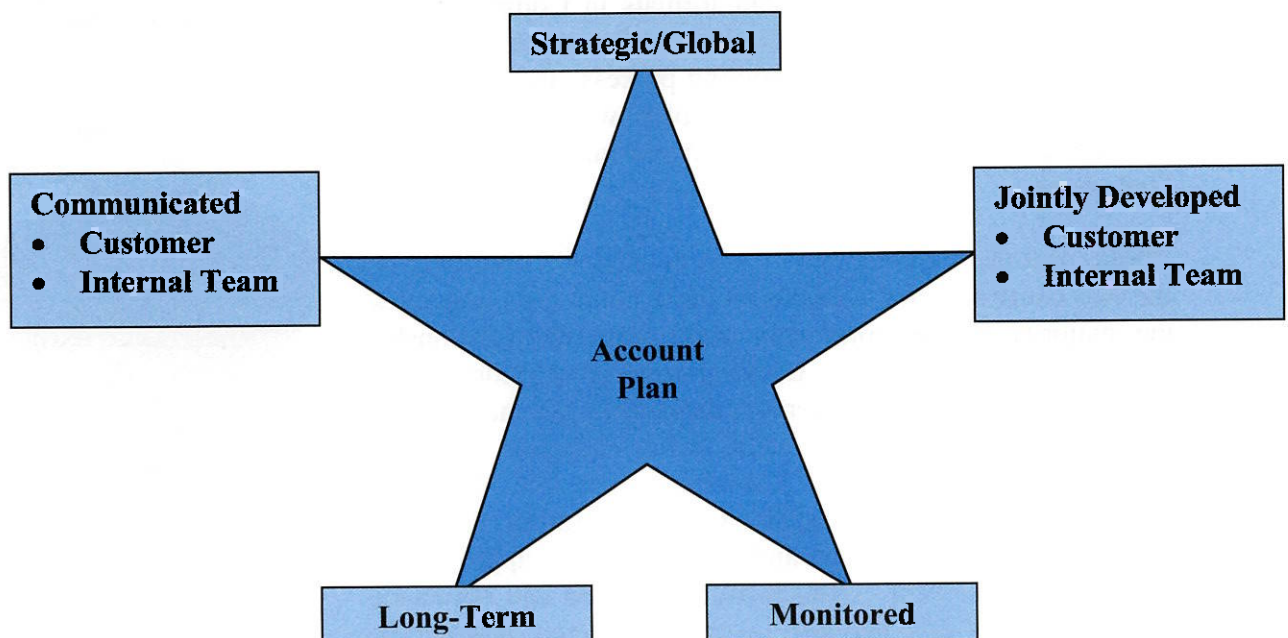


3.4.1 Account Planning

Generating account plans was identified by all the relationship managers across the four case studies as being one of their roles, whether or not they had actually yet completed the plan. This aspect of the role is mentioned by Millman (1996), when he presented his tentative list of account manager roles/responsibilities. However, little further discussion has taken place in the literature. This study has shown, however, that it is an important relationship manager role. Sub-themes of this role that emerged from the cross-case analysis are displayed in Figure 9. They were: communicated, long-term, strategic, jointly developed, and monitored.

In the case studies, account plans were seen as a key communication tool for cementing the global account team and building the customer team around the world. The relationship manager's role was to involve the whole team in the planning process in order to get buy-in to the relationship internally. Where account plans were in place the relationship manager 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. Therefore, the plan needed to be strategic, containing the overall strategy for the customer. While there would need to be local level short-term plans, the big picture for the customer would be in the relationship manager'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 relationship manager's organisation. This role was also expressed in terms of the relationship manager being the strategist for the customer.

Figure 9: Key Sub-Themes of the Account Planning Role



There were two groups of people who were involved in joint development of the plan:-

- The Internal Team: relationship managers 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 relationship manager to develop and produce a joint plan with the customer, or to at least involve the customer in parts of the planning process.

The organisation respondents represented this role in terms of monitoring and forecasting the business around the world and standardising reporting information across different regions.

3.4.2 Making Business Cases

This was identified in all four of the cases as being something the relationship manager needed to do. The only respondent group not to mention this was the internal respondents. 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 relationship manager could be for something that was also being driven by the customer. For example, one of the customer respondents noted that they wanted the relationship manager to build business cases for joint developments and projects.

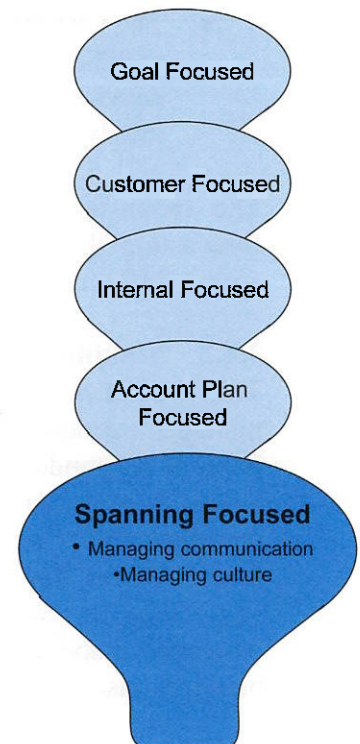
This role was also expressed by a relationship manager as a requirement for making business cases for specific projects for the customer. Another relationship manager saw the role as being like a business director in terms of weighing up different business scenarios, and being able to make some balance of judgement between losing something now, versus gaining something in the future. Relationship Manager 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 relationship managers 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 analysis of the spanning- focused roles is now presented.

3.5 Spanning Roles

Two role constructs in particular cut across the customer and internal boundaries and it was suggested that they were critical in underpinning all the other roles. In other words, if these roles were not in evidence, then it was likely that the relationship manager would find it difficult to carry out other aspects of his or her job.

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 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 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 cross-cultural issues.



3.5.1 Managing Communication

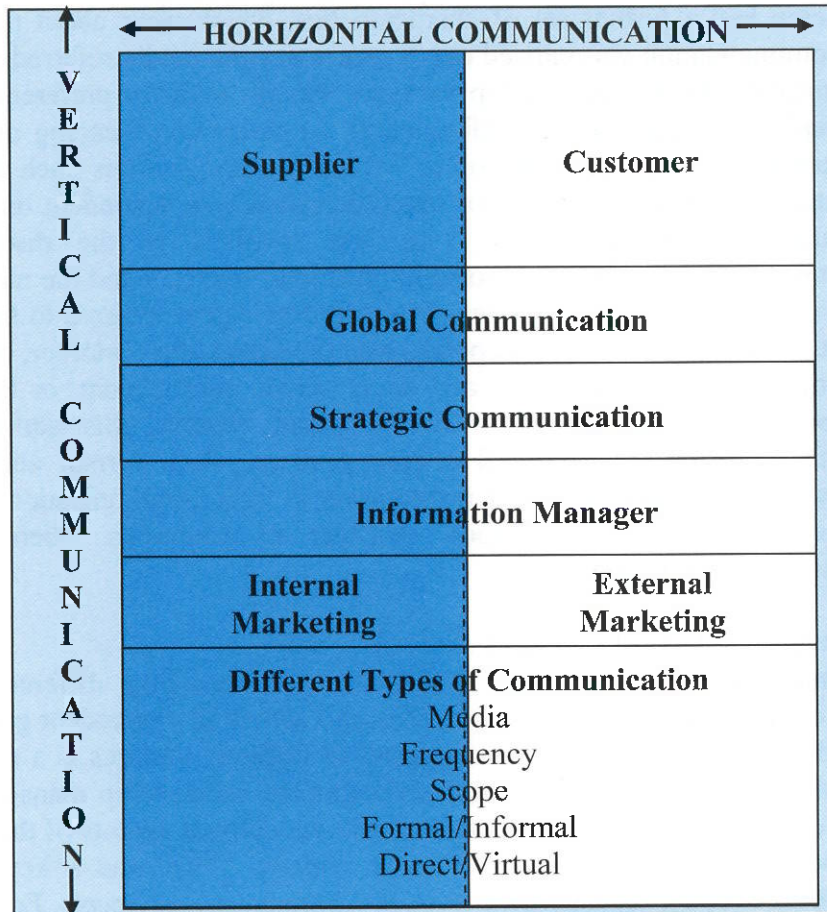
Managing communication as a spanning construct was about managing customer and internal communication. It was the second most mentioned role construct overall (91 text counts). While this role has not been explicitly discussed in the relationship manager role literature, Millman and Wilson (1999) suggest that communication skills are one of the 10 relationship manager competencies. It is also implicit in some of the other roles Millman (1999) suggests, such as the information broker role. Similarly, Biong and Selnes (1995) suggest that communication is a boundary spanning role in relational selling.

Communication was seen by many of the respondents as a key role for the relationship manager. It was described in terms of being fundamental, critically important, key to underpinning the whole relationship, all-pervasive and 'communication is everything'. These comments support the view that communication 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 10.

The key sub-theme for this construct is that of the information manager. Millman and Wilson (1995) describe a 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.

Figure 10: Model of Communication Management by the Relationship Manager



As well as information manager, respondents also used the term ‘information channel’ to describe this sub-theme. The internal team members had an expectation that the relationship manager would be the information channel both horizontally and also vertically in their own organisation. They also suggested that the relationship manager was the main channel of information with the customer.

Whilst the information manager role could involve managing strategic information, it was also about managing the more operational information including the sort of communication that was done on a regular basis such as performance reports to internal team members and to the customer.

The relationship managers 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. 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. Relationship managers were also involved in establishing global contacts and global channels of communication.

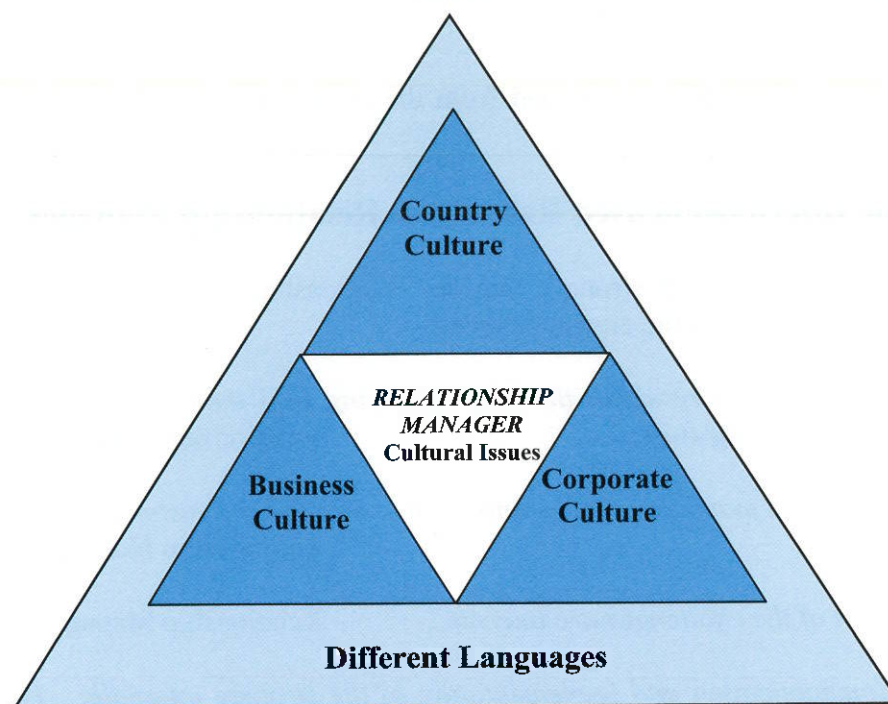
This sub-theme had a further set of characteristics, which were about the ways in which the communication was carried out. Communication media referred to whether the communication by the relationship manager was (in terms of preference) face to face, by telephone (including teleconferencing), by video conferencing or by email and the internet (or intranet), or by other written communications such as memos, notes, minutes or reports. Frequency of communication 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 referred to the way the communication was handled, often dependent on the target (the customer, the internal account team, the country managers and team, senior management, or the Board). Where these customer relationships had a global context, this added another dimension in terms of cross-cultural communications. 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.

3.5.2 Managing Different Cultures

Like the managing communication construct, the managing different cultures construct is evident across all four case studies and across all respondent groups. It is clear from the interviews that the management of different cultures is a major issue for relationship managers. In the global environment, relationship managers had to manage the cultural aspects of their customer and the cultural aspects of their internal team members and their organisations more widely. 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, involving different country and business cultures (Figure 11).

Figure 11: Cross-Cultural Issues in Global Account Management



Managing different corporate cultures was a different issue from business culture, and was about organisations having different corporate cultures both across organisations, and within organisations. For example, the corporate culture in London might be different from the corporate culture of the American office.

There was also the problem of managing different languages and the potential for confusion. 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 relationship managers 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 role for the relationship manager. This research supports his suggestion.

Having summarised the key role constructs in relationship management, we will investigate some of the implications of these findings in the next section.

4 Implications of the Five Roles

Some specific findings that emerged from the cross-case analysis are now explored and discussed.

4.1 The Internal-Focused Role of the Relationship Manager

Four statements reflected strongly that the relationship manager 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.' Relationship Manager4

'It is about managing the organisation to manage the customer.' Relationship Manager6

'Most of the challenges are internal.' Relationship Manager3

'Communication and implementation of the strategy internally. That takes about 60-70% of my time.' Relationship Manager1

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'. 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. By contrast, Millman and Wilson (2000) recognise that there may be a major internal job for the relationship manager and that the job is performed at the boundary spanning internal interface. Our report presents the first full empirical study of the role of the relationship manager.

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?

The answer is that, 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 relationship manager roles have 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 relationship managers were primarily rewarded for what they achieved with the customer, e.g. in terms of financial goals. Only the relationship managers at ComputerCo had targets based on what they had achieved in terms of leading the internal team.

What this in-depth research demonstrates is that there is a legitimate and major internal role for relationship managers. Managing the internal team and the other internal roles, and 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 relationship manager 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 Table 5 which shows that, on average, relationship managers spend approximately 30% of their time on customer-focused activities and 70% in total on internal-focused activities, including account planning.

Anecdotally, it has been evident for some time that account managers, whether global or local, spend a lot of time on internal activities. However, the small amount of research into KAM and GAM roles that has been carried out has not really addressed this issue. Our research adds to the knowledge we have about the nature of the relationship manager role. It is clear that these are boundary roles that face both ways (internally, and towards the customer) and have a management interface within their own organisation.

This research set out to not only interview relationship managers, but also their managers, customers and internal team members. It is possible that, if the relationship managers alone had been interviewed, we still would not know whether their time spent internally was purely firefighting, or whether there were legitimate internal roles for relationship managers. However, the strength of this research lies in the fact that all of the other respondent groups identified key internal activities for the relationship managers. The customer group is particularly important in identifying these activities, since they provide an external 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 relationship manager than hitherto.

Table 5: Summary of the Estimated Time Spent by relationship managers on Different Aspects of their Role

	Customer-Focused Roles	Internal Focused Roles	Account Planning Roles
<i>Relationship manager 1</i>	30	65	5
<i>Relationship manager2</i>	25	70	5
<i>Relationship manager3</i>	40	55	5
<i>Relationship manager4</i>	35	64	1
<i>Relationship manager5</i>	30	65	5
<i>Relationship manager6</i>	20	75	5
<i>Relationship manager7</i>	30	70	0
<i>Relationship manager8</i>	30	65	5
<i>Relationship manager 9</i>	30	65	5
Average Time Spent	30	66	4

4.2 The Importance of Experience

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 Table 6.

Table 6: Sample by Length of Time the Case Studies Have Been Running Their Global Account Management Programme.

Length of Time Running KAM Programme	Case Study Organisation
0-1 year	Case Study 3
Over 3 years	Case Study 2
Over 5 years	Case Studies 1 and 4

The cross-case analysis suggests that the length of time an organisation had been running its key account management programme had an effect on where they focussed: internally, or on the customer organisation. For example, ComponentsCo (case study 3) had had a KAM programme for less than a year and was still very much focused on what it needed to do internally 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 relationship management. ComponentsCo also expressed greater concern than the other case studies about managing communication and managing culture; in other words it was 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 were 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 relationship manager role, there did seem to be an implication for the main focus of the roles. Over time, the focus of the relationship manager would move from operational (in the early stages of implementation) to a strategic focus in the longer term. This relationship between the focus of the relationship manager and the length of time the customer had been managed as a key account is shown in Figure 12.

Figure 12: Model Showing the Focus of the Relationship Manager and the Relationship Manager's Team over Time

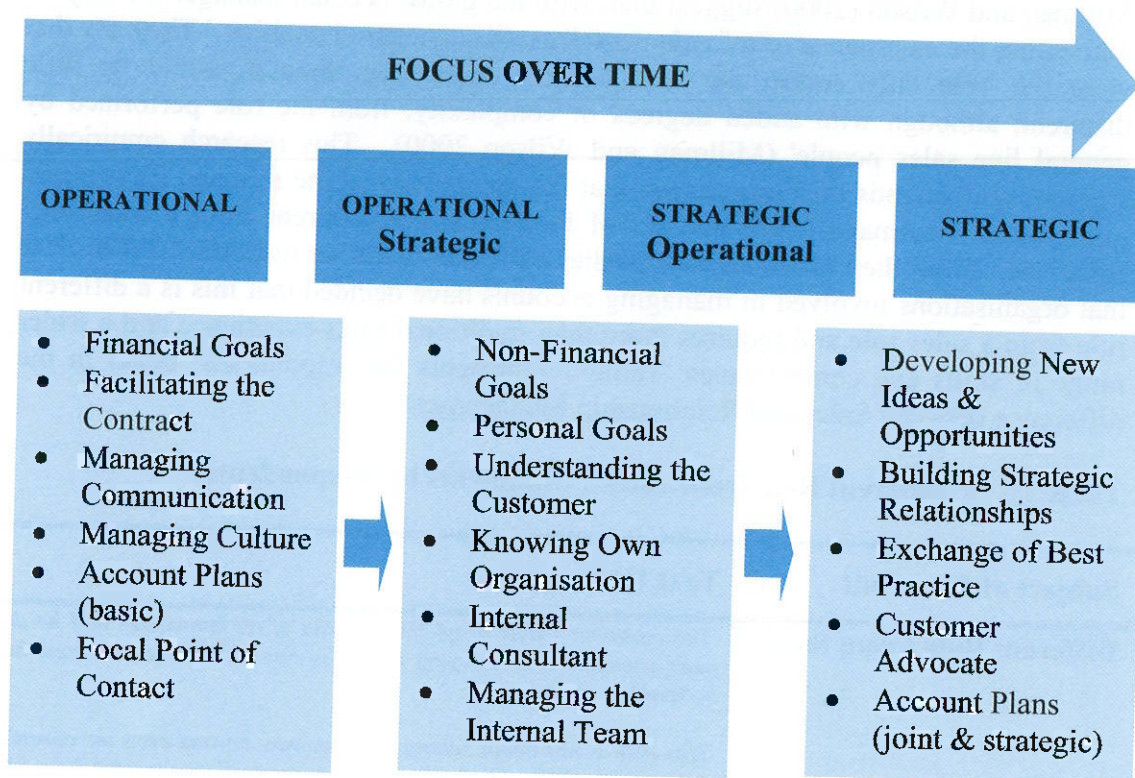


Figure 12 shows the role constructs that represent the focus of the relationship manager over time as the relationships develop. On the left-hand side of the model are the roles that the relationship manager would focus on in the early stages of the global relationship. On the right-hand side of the model are the roles that the relationship manager would focus on when the global relationship was well established.

It is important to point out that the context of all the relationships in the sample was that they were existing relationships, that both parties wanted a close relationship, and that they were interdependent in nature. Thus, even with existing and agreed relationships, there is still a development process in terms of the focus of the relationship manager over time.

4.3 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 GAM and KAM fundamentally different from a traditional sales role. From the individual case studies and from the other respondents it is clear that organisations involved in managing accounts have decided that this is a different role from a sales role and requires more than traditional sales experience and a wider range of skills and competencies. Table 7 represents the respondents' belief in the difference between Sales and Relationship Management.

Table 7: 'A Different Role from Sales': Comments by Respondents

Subject of Text Unit	Text Unit
Different Role From Sales	<p><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></p> <p><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></p> <p><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 relationship manager 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'. Researcher: 'So they're not just people with a sales background?' 'No. In fact one of the things we liked about [Relationship Manager6] was the fact that he, while he had some sales experience, his real background is military, he's a military officer.So, he's a natural at leading the team and at making decisions off his own back'.</i></p> <p><i>'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'.</i></p> <p><i>'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'.</i></p> <p><i>'These are business managers. They are not senior salespersons. If you give the senior salesperson the title of relationship manager and send them off to the customer, they can see right through them from day one'.</i></p> <p><i>'Many salespeople don't enjoy managing people, whereas these roles demand a degree of people management'.</i></p>

	<p><i>'All these are the sort of skills framework we expect for rising CEOs and managing directors.</i></p> <p><i>'They need to be global managers - not global salespeople'.</i></p> <p><i>'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'.</i></p>
<p>Age of the Relationship Manager</p>	<p><i>'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'.</i></p> <p><i>'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'.</i></p> <p><i>'We need the relationship managers 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'.</i></p> <p><i>'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'.</i></p>
<p>Experience of the Relationship Manager</p>	<p><i>'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'.</i></p> <p><i>'You can't become a relationship manager 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'.</i></p> <p><i>'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 relationship manager'.</i></p> <p><i>'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'.</i></p> <p><i>'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.'</i></p> <p><i>'Our relationship managers are senior managers. They are not junior slots by any means and they are not sales persons either'</i></p> <p><i>'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'.</i></p>

'The relationship managers have a variety of backgrounds now, rather than sales and marketing. One relationship manager comes from operations management and the relationship manager 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'.

'This is not an easy job to do. It takes us years to develop the people to do this role properly'

The comments from respondents about the age at which someone is ready to take on a relationship manager role are also significant here. The comments (see Table 7) 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 relationship manager role at the same kind of age as people take on an MD or other senior management role. The relationship managers 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.

The length of time the relationship managers had been with their particular organisation was important. Again, comments in Table 7 and throughout this report have talked of the need for the relationship manager to know their own organisation well, of the need to know the industry and of the need to understanding the customer. The relationship managers' 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 7.

It may also be of consequence that the ways in which relationship managers 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.

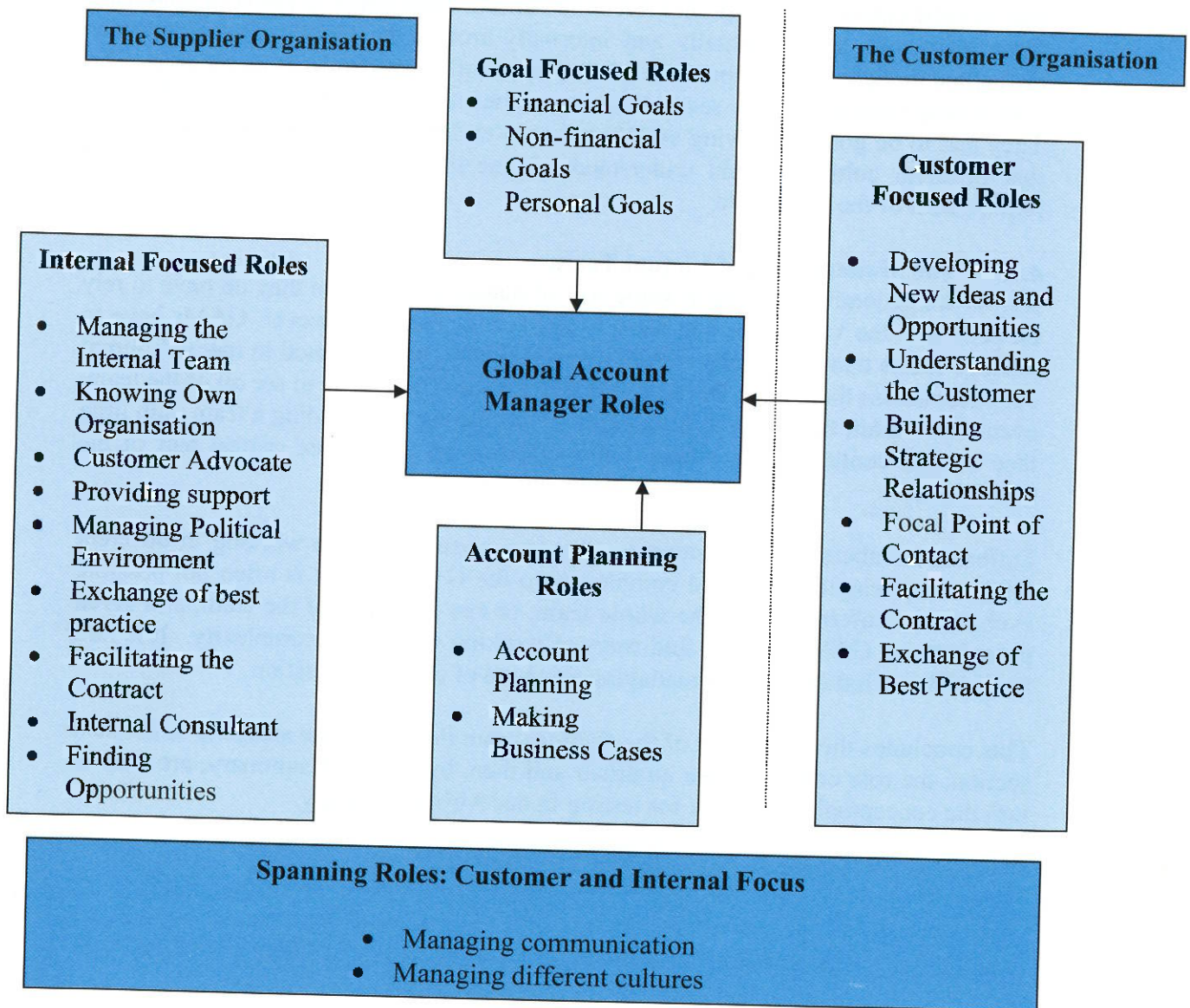
The comment from one respondent, that the GAM role was becoming more like a Managing Director for the Customer, rather than reporting into an MD of a region, sales function, business or SBU, further suggests that it may yet evolve into a role that heads up an SBU, with sole responsibility for a customer, rather than for a liner of business or a product. This would have implications for how companies are structured in the future.

Finally, the research suggests that the terminology used to describe the role e.g. Global/Key Account Manager, is part of the problem. The words global (the role is global) or Key (the account is Key), 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. There is a danger that researchers and practitioners will continue to see account manager roles as an extension of the sales role, unless the

terminology starts to change. We suggest that a better terminology for this role may be Relationship Manager or Relationship Director.

The data in the preceding chapters has helped us identify a series of roles a relationship manager fulfils within their organisation and for the customer. Figure 13 therefore represent a summary of the roles we have been able to identify for the relationship manager within the organisation. This provides an archetypal role for high level relationship managers from the 4 case studies we have provided.

Figure 13: Final Role Constructs versus Conceptual Framework



4.4 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. Whilst very little empirical research has been published on the roles of key account manager (Homberg et al. 2000), the cross case analysis in our research revealed some key differences.

4.4.1 Managing Cross-Cultural Teams and Different Cultures

One key difference between the two roles is that of managing different cultures. Whilst 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 relationship managers 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.

4.4.2 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 usually virtual geographically, 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 with little face to face contact. This makes communication an even more critical part of the GAM 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 even to 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 the next section, the role constructs are qualified and then, by way of a summary, are formed into the conceptual framework for testing in our Airline company.

5 Locating Relationship Managers within a Sales Force

5.1 Defining Work Style Preferences

Having defined the role of the relationship manager we now turn to identifying individuals within an airline company who would have a preference for working in key account roles. We therefore convert the archetype of the role of the relationship manager set out in figure 14 into a set of **work style preferences**.

By work style preferences we mean the way in which an individual approaches their job. We do this, rather than “profile” individuals because with a self-administered questionnaire you cannot identify a personality profile – only a set of preferences. Table 8 therefore represents the different work styles which emerge from the role of the Relationship Manager identified in the 4 case studies. We provide a definition of each of these preferences.

In setting out to identify the relationship managers in our airline company we used the work style preferences shown in table 8 and counterbalanced these styles with the equivalent sales style in each category. For example our data suggested that account managers need to have a planning preference towards: “I have got good strategic planning skills and make medium to long term plans often jointly with the customer.” In its sales alternative we would expect: “My strengths are in capturing vague visions or strategies and turning them into action.”

Table 8: Work Styles of the Relationship Manager

Work Style	Definition
Information	I like working with information and co-ordinating information inside my firm and between us and the customer
Strategic Marketing	I understand the customer's strategy and match it with ours. In fact, sometimes I understand the customer better than they understand themselves.
Commercial	We should have a broad understanding of the customer's marketplace and understand the impact of external forces on our customers.
Knowledge	We should be dealing with the future of both businesses and developing a shared vision. This means understanding the customer's core competencies and how ours can match theirs.
Financial	I have a good understanding of the longer-term financial impact of the commercial decisions my clients make and can help them to make the business case.

Organisation and Culture	I understand the customer's corporate culture and how they do business, and can speak to that when presenting to them. It is important to have connections at all levels of the organisation and I am comfortable with that.
Complexity, Risk and Uncertainty.	Change and unpredictability are all part of the relationship. I analyse risk and uncertainty and take action about it. Try to avoid taking high risks in uncertain situation
Strategy Development	I have a broad vision about how I want the relationship between the two organisations to develop and am actively guiding both parties in this direction.
Planning	I have got good strategic planning skills and make medium to long term plans often jointly with the customer.
Implements Strategy	Good performance in a KAM role is about recognising when the plan is no longer relevant and making alternative plans if need be.
Organises	I think it is important to plan ahead with the customer and ensure that everyone in both organisations knows what the future plans are.
Responsibility	I understand the political issues. I consult and communicate but, at the end of the day, the responsibility for the customer is mine.
Prioritises	I use a customer-validated criteria-based process for identifying key customers, and desirable bits of business within them.
Sells & Negotiates Externally	My major strengths are understanding the customer in depth, generating compelling value propositions, and negotiating value-based premiums.
Sells & Negotiates Internally	The internal selling role is a major part of my function. Maybe 60-80% of my time is spent trying to secure delivery of the promise to the customer.
Operational Delivery and Supply Chain/ Project	I work closely with operations, especially on customisations. I recognise potential issues and address them pro-actively. I can identify supply chain/project opportunities and contribute to task forces. Part of my role is to manage exchange of best practice.
External Relationships	I build relationships that will ensure a good relationship between the two companies and that can function without me.
Internal Relationships	I have close, shared relationships with people inside my company at a wide range of functions and levels, who understand the relationship aims, buy into them, support and pro-actively offer relevant new ideas.
Account Team	I trust my KAM team to interact directly with customer. They are empowered to act, but understand when the key account manager should be involved.
Communication	I make communication plans for key decisions. My style is to communicate decisions early, and to encourage responses and comments. I tailor my media and messages to suit my audience.

Culture	I try to take a global view, and work with many nationalities. I am internationally experienced. I can run multi-cultural teams. I can manage across time zones.
Personal Style	My personal style is best described as: Change agent. Working for the company more than for myself. Command respect at all levels. Act like a high-level business manager.
Customer Preference	I am most comfortable working with customers who are interested in a strategic relationship, where we have good access to various levels of the company, and where the customer is interested in joint innovation or other breakthrough projects.

The literature suggested that, for the four different types of key account relationship, there should theoretically be four types of Account Manager (Figure 3). The tool used in this study looked for individuals exhibiting the work style preference that would identify them as “natural” relationship managers.

5.2 Examining Work Style Preferences

Analysing the entire customer-facing work force of the airline operator, we find a great divergence in work style preferences. Figure 15 provides a 95% confidence interval of the probable population mean of attitudes across the organisation². High numbers would imply a tendency towards Relationship Management and low numbers indicate a tendency towards a traditional sales perspective.

An explanation of the confidence intervals used in Figure 15 is set out below.

5.2.1 Understanding the Data: The Use of Confidence Intervals

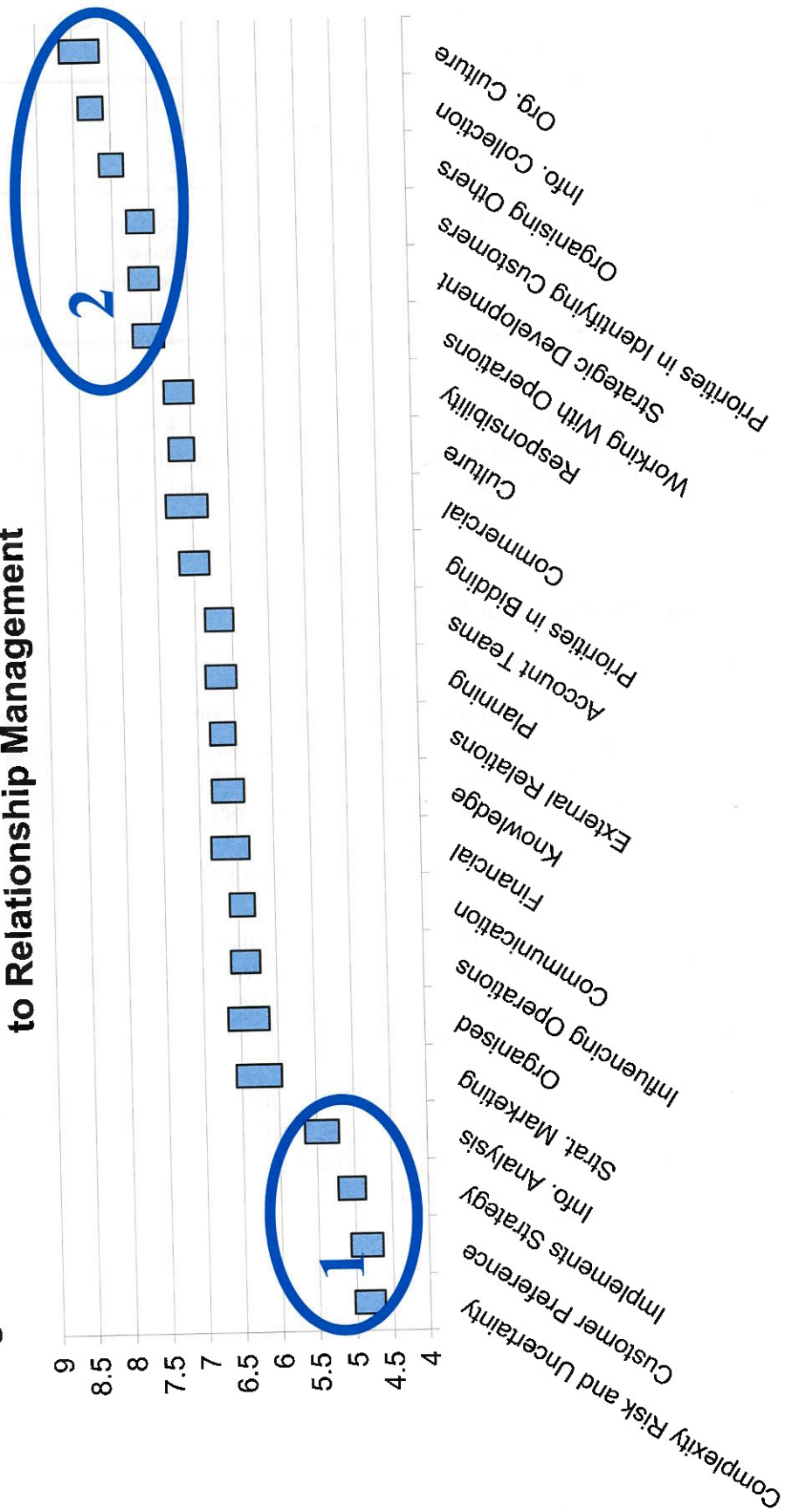
To test our results, we look at the confidence interval to understand the relative significance of our findings (Figure 14). The confidence interval shows where the likely population mean (average) would fall.

The larger the bar, the wider the range the population mean could fall into. The middle of the bars represents the average value from the questionnaire used. This report uses 95% confidence intervals for understanding the significance of the average scores produced in this research, rather than absolute values, to reduce the level of error in the data reported.

For example, if we look at the first column of Figure 14, we can be 95% confident that the total workforce for our airline company would give an average score between 4.7 and 5.0 (out of 10) for the extent to which they feel in control and are able to manage the complex nature of risk within a relationship. This indicates that our respondents are actually liable to be risk takers (as with many sales people) and tend to see risk as something to be taken, rather than something to be managed. We applied the same analysis to all the other work style preferences.

² All averages of items were indexed to ten to allow visual comparability

Figure 14: 95% Confidence Interval of Population Means for Attitude to Relationship Management



Across the airline's customer facing work force we see some definite trends in work style preference (Figure 14). There is a marked difference between the respondent preferences on the left (area 1) compared to the right (area 2) of Figure 14, and this will now be discussed.

Statistically, there are two distinct groupings in Figure 14. The first grouping is to the left (area 1), where we find some 'sales-type' preferences. The second grouping is to the right (area 2), where we find some 'key account manager' preferences.

5.2.2 Sales Preferences

There are four sales type preferences in this work force. These are shown to the left of Figure 15.

- **Risk** - in our sample many of the respondents had a tendency to be risk takers in uncertain situations. However, this could be inappropriate in Key Customer interactions because a relationship manager would not wish to create problems in their relationship with a client by taking unnecessary risk.
- **Customer Preference** – in our sample many of the respondents had a preference for working with non-strategic customer who based their interaction on negotiation, price and a quick sale rather than on long term strategic alliances.
- **Strategy Implementation** – many of the airline respondents felt unable to follow client strategy implementation plans. This in itself does not suggest it is a sales orientated work style preference but that implementation plans are viewed as largely negotiable.
- **Information Analysis** – this related to the extent to which the individual enjoyed analysing client data to seek new strategic opportunities. In particular it focused on the extent to which intuition as opposed to detailed research informed customer management decisions. What we found was few people relying on the research, and most acting on impulse.

The first thing that can be said about these issues is that all of them to some extent are expected results. With the majority of the respondents coming from sales and marketing backgrounds the work style preferences for acting on impulse, staying flexible, taking risks and wanting to work with transactional customers is hardly surprising. The unusual finding, however, is the extent to which people had these preferences across the entire work force, and how few respondents focused on strategic, long term, planned account relationships. In other words, the profiling reveals that there are very few, if any, individuals within the current airline customer-facing work force who profile as high-level key account managers. This could be a major issue for this airline as it attempts to implement KAM, as the results suggest that it would be difficult to use the current workforce immediately to commence key account management. Therefore there might be a need to either retrain or recruit suitable individuals.

One issue that should certainly be reviewed is the extent to which rewards and motivations in the organisation are geared towards exacerbating the current preferred work style. If individuals are particularly interested in working with short-term, transaction orientated accounts, it may be that this is because they are rewarded more for short term sales than for long term relationship development.

More generally, given the substantial sample size, our results might suggest that key account managers are comparatively rare in the population at large. Certainly, the results imply that KAM is rather different from sales.

5.2.3 Key Account Manager Preferences

There were a cluster of six work style preferences that fell to the right of Figure 15 that seemed indicative of key account manager preferences:

- **Working with Operations** – This measurement looked at the importance, as revealed by the case studies, of the internal role of the relationship manager. In our sample many of the respondents had a significant internal role and had cause to work extensively with operational departments. Counterbalancing this, to some extent, was the finding that most respondents felt unable to influence operational departments to a particularly high degree. Despite frequent contact with operations, the relationship managers were not always able to ensure customer needs were met.
- **Strategic Development** – despite the lack of interest in analysing customers or implementing formulated strategy, our respondents felt that they were already in a position to identify what they wanted from their future interactions with customers and were capable of, and enjoy, guiding customers in that direction. This was a somewhat alarming finding, as it suggested too much decision-making based on intuition, rather than fully-researched plans. The ability to guide and develop strategic direction is a useful attribute in a key account manager, as long as it is firmly rooted in research.
- **Prioritising Accounts** – the vast majority of our respondents felt more comfortable working in environments with a clear and structured process for identifying and prioritising key customers. Therefore they would suit a formalised relationship management program where accounts are clearly delineated based on evidence and research.
- **Organising Others** – The vast majority of our respondents also felt they were good at organising other people. This is key as a relationship manager in terms of both internally managing an account team, but also in ensuring that promises to customers are satisfied.
- **Information Collection** – our respondents enjoyed interaction with customers on many levels. They had a preference for networking with multiple people across the client to build a more rounded knowledge of that customer. However, here a word of caution must be raised that undertaking this time intensive activity becomes fruitless unless a structured system of collecting analysing and using this information can be established. A structured mechanism for collating, storing and accessing data is required, and maintaining such a system needs to be written into the relationship manager's role.

- **Understanding Organisational Cultures** – in our sample many of the respondents enjoyed learning about and being involved in their customers' culture. As previous research has indicated, this can be important for a key account manager. Once again, a structured process/ system for capturing and using this information is important.

Overall, across this customer-facing work force we see a wide distribution of work style preferences ranging from sales preferences to key account manager preferences. The problem for the airline lies in this very wide range. At the individual level, there were very few people with a work style preference strongly associated with traditional sales, which is good news given its relationship orientation. However, there was also a lack of individuals with a work style preference strongly associated with KAM (that is, strongly to the right of Figure 15). The lack of people who prefer the KAM (or GAM) role suggests that these individuals are rare. Therefore, it is important for companies to understand how to develop relationship managers. To address this question, we looked deeper into the work style profiles to identify what type of people work within this organisation. To do this, we conducted a cluster analysis to group likeminded respondents together. These groupings will be described in the next section.

5.3 Profiling Using Work Style Profiles

In this airline, we found that individual respondents grouped into three distinct categories. The analysis identified three distinct attitudes and approaches to relationship management in the organisation. We have named these three different profiles Self Directed, Team Leader/ Player, and Strategic Sellers.

- **Self Directed** – Are individuals who prefer to work alone, on high risk accounts and keep a flexible, sales orientated approach to their roles.
- **Team Leader / Player** - Are individuals who like to be part of an account team; they enjoy managerial responsibility and developing plans and conducting research on accounts. However, they have a preference for working on transactional accounts, concentration on short term deadlines and goals and their lack of interest in understanding the overall market place limits their interest in KAM.
- **Strategic Sellers** – Although these individuals have many characteristics of key account managers they are not entirely interested in what this means functionally. They like to be seen as industry experts and enjoy having strategic discussions and working with customers long-term. However they have only a limited interest in intensive data analysis and customer insight and focus on a high risk strategy to sales. This leads to a rather high propensity to avoid planning and implementation exercises in favour of a little less structure to their roles.

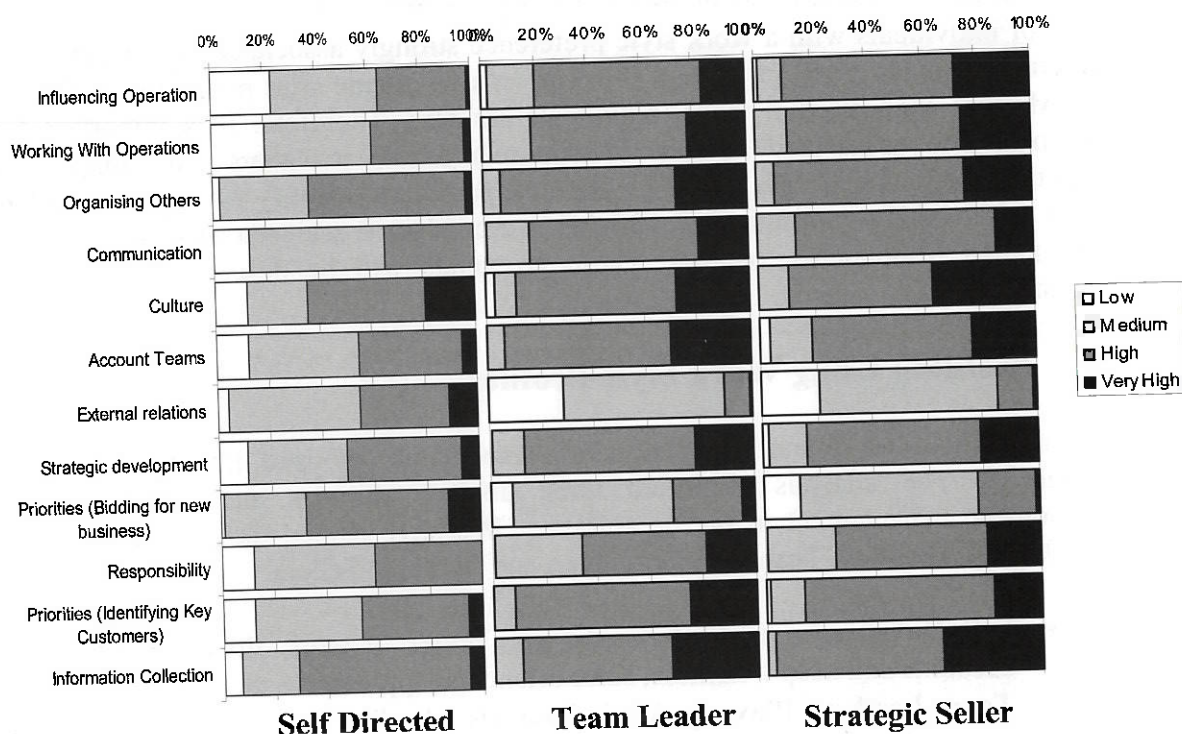
The most valuable way of analysing the data is to look at our three profiles in relation to the five components of the factor analysis by mathematically grouping them with items they have statistical similarity to. This gives us 5 groups of work style preference: Management of Others, Information Management, Market Sensitivity,

Diligence and Practicality, which can be seen in Figures 15 to 17. Diligence and Practicality did not appear to have any clear trends in the data and so are discussed as one item below.

5.3.1 Management of Others

Figure 15 shows a summary of the three groups in relation to the management of others.

Figure 15: Management of Others Scores by Personality

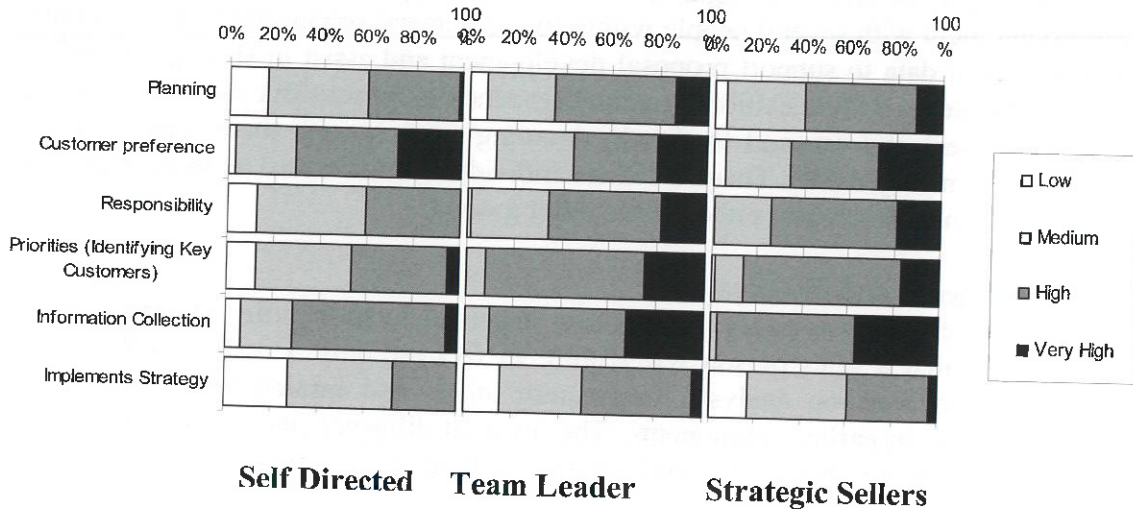


Through the management of others we can see the clearest difference between Self Directed individuals and those of a Team Leader or Strategic Seller perspective. Team Leaders and Strategic Sellers are generally homogeneous in respect to the management of others. There is a clear difference in the level of low scores (traditional sales type scores – represented in white and light grey in figure 15) compared with both other clusters. Team Leaders and Strategic Sellers feel that they work as part of an overall team, have responsibilities to work collaboratively with operations and formalise communications for others to understand and follow. However Self Directed relationship managers are more prone to seeing themselves as an individual unit, operating under their own counsel and not taking responsibility for others and their operations.

5.3.2 Information Management

Figure 16 shows the cluster configuration for component 2: Information Management.

Figure 16: Information Management scores by cluster

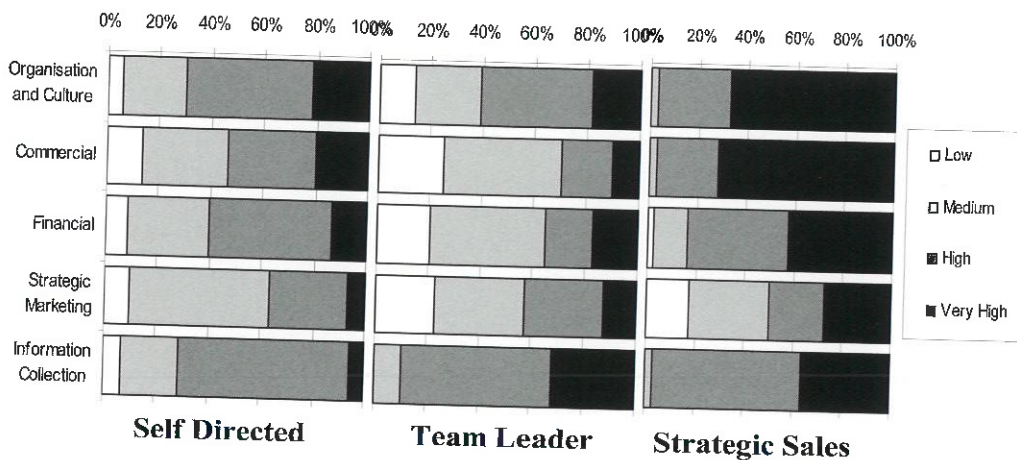


Information management is a lesser differentiator between Self Directed relationship managers and the others than Management of Others, but is still a differentiator on key points. Team Leaders and Strategic Sellers are diligent information collectors compared to Self Directed individuals. Likewise, they are more likely to be account planners and have set strategies for identifying opportunities with clients and prioritising those accounts as part of a portfolio.

5.3.3 Market Sensitivity

Market sensitivity differentiates Strategic Sellers from Team Leaders. Figure 17 illustrates this difference.

Figure 17: Market Sensitivity Scores by Personality



In market sensitivity we find a tendency for Strategic Sellers to score themselves at the high end of attitudes and approaches related to empathy and long term commitment to customers. In particular we see individuals identifying themselves as having a major concern with long-term strategic issues (Financial Time Horizon measure and Strategic Marketing e.g. looking beyond financials in pitches). We also find Strategic Sellers investigating commercial opportunities in customers by discussing them with several people within the customers' organisation and collecting high levels of data to support proposal development and assist in strategic planning. Overall, Strategic Sellers exhibit a marked tendency to be sensitive to the market and their customers and respond to this by learning (tied in with their high scores in information management). Therefore these individuals can be seen as more long term strategically orientated than either of the other groups.

5.3.4 Diligence and Practicality

The diligence and practicality components appeared to have little influence on the cluster to which a sales person fell within. In fact the only 3 items which proved significant, Information analysis, Organising others and Implement Strategy have been discussed in earlier components. The areas of diligence and practicality appear individualised rather than pertaining to a specific type of sales person.

6 Implications of Work Style Preferences for the Selection and Management of Key Account Managers

The objective of the airline case study was to identify individuals with relationship management attributes in terms of their work style preference. We identified a series of attitudes and approaches to sales in our qualitative research which formed the archetype of a relationship manager which differentiated the relationship managers from sales people. In this case we were investigating whether we could identify these individuals within an organisation looking to implement Key Account Management.

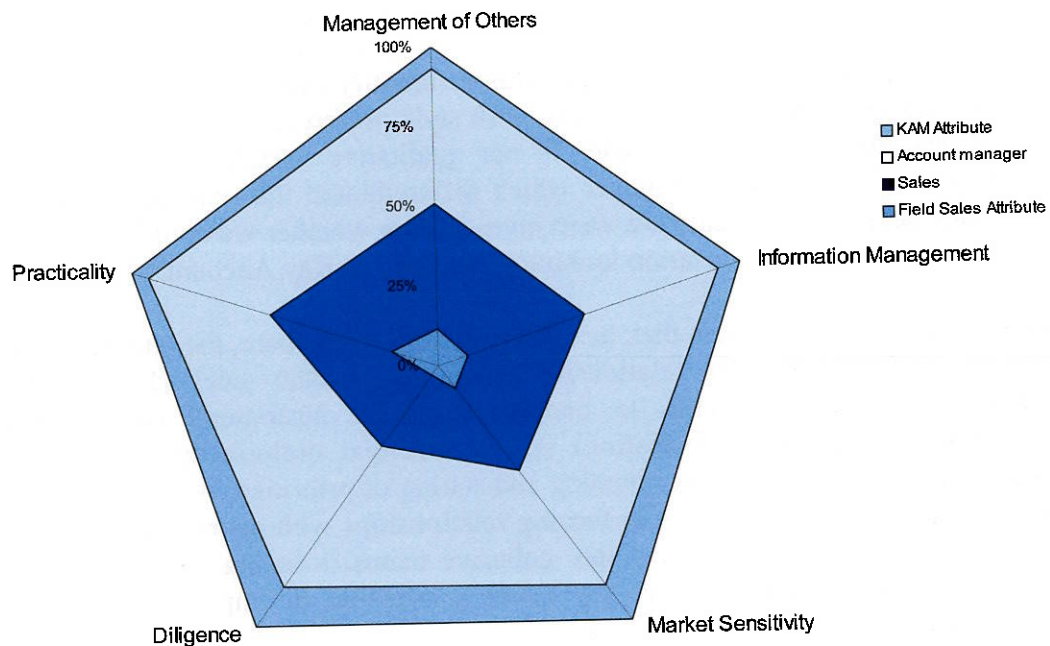
Initially we are able to assess that, across the overall work force, the attributes show a stronger tendency towards relationship management than sales (Figure 14). In particular we see approaches to understanding the customer's culture, market environment (collecting information) and commercial outlook driving formalised strategic development, account planning and setting of priorities. We also see that the relationship managers' attitudes to forging relationships with operations and viewing their roles as coordinating others into cohesive teams is strong within the sample. These strong tendencies support the airline's intention to implement relationship management.

However, we also see in Figure 14 that the participant's preferences in work style are somewhat at odds with this change in attitude. We observe that, despite taking all the time to build understanding of the client and to plan, they give a low priority to analysing this data to get the most out of it. Beyond this, they prefer clients who have price as their main rationale for decision-making and still prefer the cut and thrust of taking risks in relationships and avoiding prescriptive implementation plans for client strategy. This brings into question whether the salespeople and relationship managers are being required to undertake strategic roles in the organisation for internal selling but are rewarded for chasing non-strategic clients. If this is the case, the organisation may need to consider the rewards and motivation techniques it is using.

The work style preferences can be condensed into 5 components: Management of Others, Information Management, Market Sensitivity, Diligence and Practicality. These 5 components are the basis through which we can understand the individuals within the sales and relationship management environment (See Figure 18).

In Figure 19 we see that the respondents at the airline have predominantly sales and Account Management style work preferences with very few people exhibit strong KAM attributes. However their preference for account management bodes well for their future strategy.

Figure 18: The spread of Relationship Manager Attributes



The analysis suggests that, as it implements KAM, the airline will need to provide some training and development for its relationship managers in a number of areas. It is not clear that all these areas are, in fact, 'trainable', so there may need to be some recruitment of key account managers to enable the implementation of KAM.

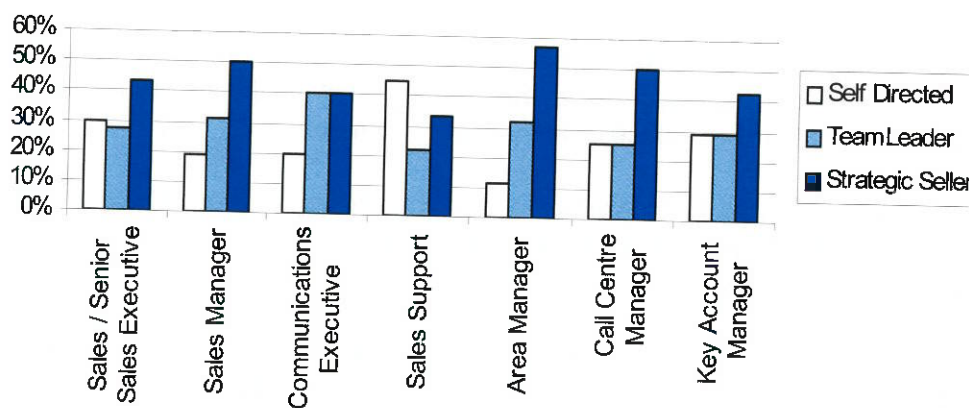
Using these different attributes the data identified three different groups of people with different work style preferences based on certain specific attitudes toward relationship management and work style. We labelled the three groups of individuals Self Directed, Team Leaders and Strategic Sellers based on the attitudes and approaches to the sales and relationship management role.

Self Directed people have a propensity to view themselves and their role from an individualist perspective. They are unlikely to have an interest in managing others or taking on-board responsibility, although they do see the need for having to influence others to do a certain amount of work for them. They prefer informal communication channels, flexibility in their role, and have a dislike of spending time collecting reams of customer information and planning their accounts. In essence they prefer to be left to their own devices and avoid structured work patterns and responsibility. In that sense these individuals may very well represent something akin to the entrepreneur as identified in Figure 3 but do not universally match the characteristics on all attitudinal scales.

Team Leaders on the other hand are differentiated from Self Directed based on Information Management and Managing Others, as they are more likely to prefer working in a team, building a greater understanding of the client and using this to plan out customer bids. The use of the term Team Leader does not infer seniority but, rather, a preference for taking on responsibility as part of a team. These individuals feel at their best when there is a structure in place to drive their work. They enjoy gaining an understanding of the customer and using this information to plan out the customer strategy. They understand the need to align other areas of the business behind what they do and prefer formalised methods of interacting and placing demands on others. However they are differentiated from Strategic Salespeople based on a predisposition towards short-termism, not seeking out cultural knowledge of the customer perspectives and staying clear of long term joint strategic planning. Therefore Team Leaders probably suit working with customers with whom the organisation want no long-term integration strategically and are better suited to chasing one off pieces of work or working with profitable but non-strategic customers. In this way these individuals probably suit the “maintain” sort of customers and possibly the lower priority amongst the “selectively invest” customers, that is those who are less likely to become important to the supplier.

Strategic Sellers are most clearly differentiated based on their long-term outlook and predilection for involved pieces of work needing volumes of data, especially cultural and organisational dynamic data from within the customer. Although not particularly matching any of the original hypothesised personalities they appear to sit between the theoretical ‘project manager’ and ‘business manager’ position on work style, but maintain a level of risk taking and desire for flexibility most associated with entrepreneurs. These individuals would suit “selective investment” and some “invest” clients but their propensity for risk taking may need watching in highly strategic relationships.

Figure 19: Percentage of Job Title by Cluster



When we check the new personalities against their actual roles we find that there are more Strategic Sellers than any other in all but sales support (Figure 19). Strategic Sales individuals are particularly prevalent in both sales managers and area managers. The evidence in this case goes a long way to show that sales people are, in fact, better equipped for relationship selling than for traditional sales in this particular company.

6.1 Discussion

This research has established a number of important and useful findings that are very relevant to the implementation and management of KAM and, in particular, the idea of matching the key account manager to the key account for optimal performance of the key account portfolio.

The research establishes, in some detail and for the first time, exactly what is the role of the key account manager. It reveals that there are five key account manager roles:

- Goal roles
- Customer focused roles
- Internally focused roles
- Account Planning roles
- Spanning or cross-boundary roles

Moreover, the research indicates that the key account manager's main time commitment is to internally-focused rather than customer-facing activities. This makes the role of the key account manager very different from that of the traditional sales person.

Moving on from this finding, we then examined the work style preferences that people had, to try to identify whether there was a 'natural' key account manager and to test the theoretical position that there should be four theoretical types of key account manager to manage the four types of key account relationship that are typically identified in a key account portfolio.

Our research in a substantial sample of all customer-facing people in a major airline indicated that there were three clusters of work style preferences, rather than four. These clusters were: self-directed; team leader / member; and strategic seller. Self-directed individuals are risk-taking sales types. They are the closest to the Entrepreneur type of key account manager suggested in the theoretical model, and might be very effective in selective investment accounts.

The second cluster was team leader / member, who enjoy researching and planning key accounts. They are not great strategic thinkers but are closer to the project manager theoretical role.

The third cluster was strategic sellers. These might be able to carry out a business manager role, but they would need planning support to do this.

We did not find a traditional sales cluster that would correspond with the theoretical role of the tactician. This does not prove that there is no such role; it simply means that we did not find it at the airline. The reason could be that the airline with which we did the analysis is already quite customer- and relationship-focused, so it tends not to attract or employ tacticians.

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Cranfield
UNIVERSITY
School of Management

Cranfield, Bedford, United Kingdom MK43 0AL
Telephone +44 (0) 1234 751122
Fax +44 (0) 1234 751806
<http://www.cranfield.ac.uk/som>

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