Building Account Management Capabilities

By Laura Baginski and Deborah Deale

One of the first steps was to identify key factors for success.

To begin telling our story, let's jump back a few years when Bristol-Myers Squibb rolled out a globally adopted sales model, which accelerated the need for a common approach to managing accounts. Account-facing teams began to seek additional guidance and support to meet account needs in a coordinated, compliant manner, and matrix teams sought to enhance their skills, tools, and support to meet new demands.

Coupled with an increased complexity in the marketplace, this resulted in BMS seeking a way to meet these growing needs. The organization began assessing its practices

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internally and establishing a vision for a more effective process to manage accounts. One of the first steps was to identify key factors for success — which included defining roles and responsibilities, outlining necessary skills and behaviors, defining a process and determining an effective, efficient tool for implementation. BMS also defined current and desired performance identity gaps, and then put out a request for proposal (RFP) to find a firm who could meet their needs.

Proficient Learning was selected to analyze, design and implement an effective account management process and supporting training program that shifted the way BMS account teams managed customers. The underlying goal was to implement an account management process that delivered an exceptional BMS experience.

The first phase of the partnership involved taking a look at BMS' current practices and conducting a complete needs analysis to guide the process design and development. BMS had

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been using account management practices in some markets at varying levels, but there was a lack of consistency. To see what was working and what wasn't, we surveyed core advisory members. We also conducted more than 20 interviews with senior leadership in varying roles and asked questions such as: "What does 'good' look like in your eyes?" and "What do you see as potential barriers to success?"

These interviews focused on identifying some best-in-class account management examples, and gathering and reviewing curriculum materials from different markets to provide deeper insight on what could work. The outcome of this phase was the advisory and core teams' validation of an account management process model, concise definition and guiding principles.

For the second phase of the project, we worked together to design and develop this blended-learning modular training program based on the extensive diagnostic process. Our goal was to create a foundational program that ensured all matrix team members were trained on a common vocabulary and process, and within compliance guidelines. We opted for a modular design so we could provide local markets the option to launch as appropriate. The final program included six modules that focused on the different phases of the process and specific skills and knowledge needed for success using the account management model.

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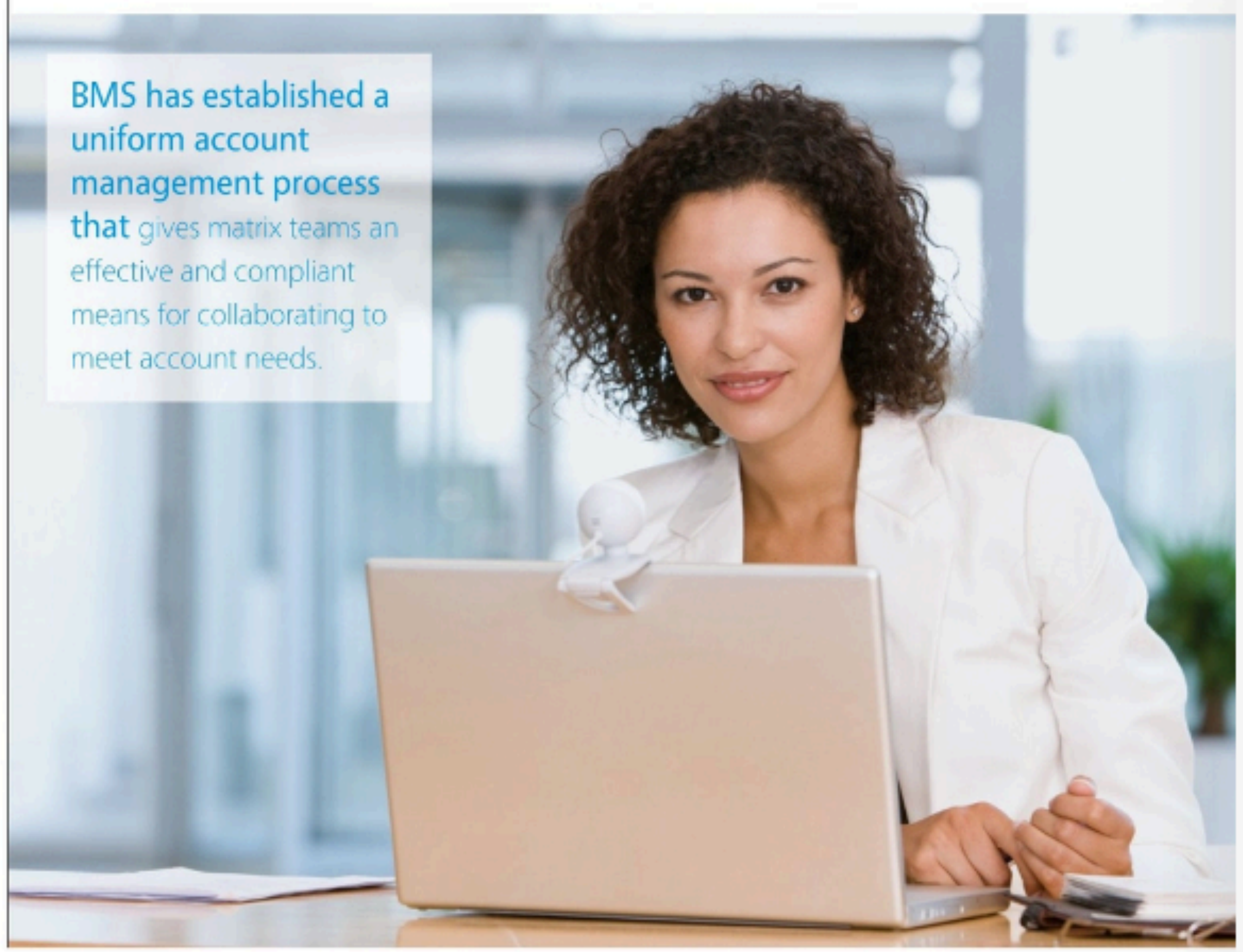
Four of the modules needed to be launched in a sequential manner — but could occur over the course of a few months — and a compliance module was required to be launched in conjunction with initial rollout to ensure all matrix team members clearly understood collaboration guidance. The final module, team leadership, could be used as needed by each market. eLearning modules were used to prepare participants for the training and to provide specific guidance on how to use an account-planning tool.



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We created a curriculum-planning framework for both foundational and advanced programs, with the foundational program pilot-tested in four different markets. The purpose of this foundational program was to establish a baseline of common knowledge, skills and communication necessary for effective and compliant account management.

Using initial reaction (Level 1) and experience reaction (Level 2) evaluation methods, along with interviews and observations, we were able to identify areas of success and improvement to the training materials. Participants and managers in all four markets agreed that the training provided a good overview of the knowledge and skills, as well as the supporting materials, needed for effective account management. Following the pilot, we reviewed all feedback and reworked varying parts of the training to better meet participant and manager needs.

This resulted in a complete blended-learning foundational program that has been quickly adopted by each BMS market. The final program features a train-the-trainer video series that was built to establish consistency in training, eModules designed to provide just-in-time support and training for the digital tool, and a condensed workshop for senior leadership and second-line manager roles so that they can plan for, support, pull through and participate in their market launches.

Since making the program part of their business practice, BMS has established a uniform account management process that gives matrix teams an effective and compliant means for collaborating to meet account needs. The foundational training program grounded

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all cross-functional roles and first-line managers in practices for appropriate communication and account planning, and provided matrix teams with a clear understanding of each other's roles and functions as they relate to account management. Each team member now benefits from greater insight into how to best support one another in a compliant manner.

The next step in our journey is to create an advanced curriculum for both account-facing roles and their managers. We plan to target specific roles within the matrix for deeper skill development, and source coaches to support first-line managers.

While we succeeded at implementing such a significant procedural change, there are a few takeaways that can help your organization in mirroring this process. Be sure to involve a cross-function of stakeholders from the start. Follow a model of historically successful implementation to avoid wasting your time on methods that won't work. Socialize at all phases and levels, and ensure a collaborative relationship with legal and compliance stakeholders. Last but not least, be transparent with everyone involved so that it's easier to get them all on board. ■

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