

## WHERE VALUE LIVES

# SAM CAPABILITY DIAGNOSTIC AND BUILD WORKBOOK

## Executive Implementation Resource

| Resource                   | Details                                                                                                                                           |
|----------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------|
| Permanent Deliverable      | DEL-000008                                                                                                                                        |
| Primary supporting chapter | Chapter 11 - The Organisation Behind the Account Manager                                                                                          |
| Cross-chapter reuse        | Chapter 22 - Building the Strategic Account Capability; Chapter 23 - Leading the SAM Organisation; Chapter 24 - Making SAM Work in the Real World |
| Purpose                    | Assess the current SAM operating system, identify capability gaps and convert them into a practical build plan and 90-day activation pathway.     |
| Customer outputs           | Editable DOCX + Print PDF                                                                                                                         |

**Strategic Account Management is an organisational capability, not a heroic individual performance.**

Use this workbook with a leadership team, SAM community or cross-functional group. The objective is to make the system around strategic accounts visible, assess its maturity and decide what must change next.

This workbook will also be helpful later, after you have read Chapters 22 - 24

## How to Use This Workbook

The workbook follows the logic of the SAM Capability Architecture: capability must be repeatable, deliberate and sustainable. It should not depend on exceptional memory, persistence or personal heroics.

- Start with the Organisational Capability Diagnostic.
- Agree the purpose and mutual-value logic for SAM.
- Assess the ten elements of the SAM Capability Architecture.
- Test role clarity, service quality, orchestration and leadership attention.
- Prioritise the gaps that most affect customer-recognised value.
- Translate priorities into a staged capability build and a 90-day activation plan.

## 1. SAM Organisational Capability Diagnostic

Answer the ten 'Who...?' questions. The test is whether the organisation has a clear, repeatable answer - not whether one experienced individual happens to know what to do.

| Capability question                  | Clear owner? | Repeatable process? | Evidence | Gap / action |
|--------------------------------------|--------------|---------------------|----------|--------------|
| Who chooses strategic accounts?      | Y / N        | 1 2 3 4 5           |          |              |
| Who reviews the choice?              | Y / N        | 1 2 3 4 5           |          |              |
| Who owns customer insight?           | Y / N        | 1 2 3 4 5           |          |              |
| Who supports the SAM?                | Y / N        | 1 2 3 4 5           |          |              |
| Who joins the relationship and when? | Y / N        | 1 2 3 4 5           |          |              |
| Who sponsors the account?            | Y / N        | 1 2 3 4 5           |          |              |
| Who evidences value?                 | Y / N        | 1 2 3 4 5           |          |              |
| Who resolves internal conflict?      | Y / N        | 1 2 3 4 5           |          |              |
| Who decides where attention goes?    | Y / N        | 1 2 3 4 5           |          |              |
| Who learns from the relationship?    | Y / N        | 1 2 3 4 5           |          |              |

## 2. SAM Strategic Intent Worksheet

Strategic intent must go beyond wanting more revenue from large customers. Define the mutual-value logic and the consequences of choosing to operate a SAM model.

| Strategic intent question                                      | Leadership answer / evidence |
|----------------------------------------------------------------|------------------------------|
| Why are we doing Strategic Account Management?                 |                              |
| What kind of strategic relationships are we trying to build?   |                              |
| What value do we want to create for selected customers?        |                              |
| What future value could those customers create for us?         |                              |
| Why do these relationships deserve disproportionate attention? |                              |
| How does SAM support our wider business strategy?              |                              |
| What will we stop doing because attention is scarce?           |                              |

### Intent With Consequences

| Decision                                                                | What this means in practice |
|-------------------------------------------------------------------------|-----------------------------|
| Which relationships receive innovation effort?                          |                             |
| Which receive executive sponsorship?                                    |                             |
| Which receive cross-functional resource?                                |                             |
| Which customers receive excellent service but not strategic investment? |                             |

### 3. SAM Capability Architecture - Ten-Element Assessment

Rate each element from 1 to 5. Use evidence, not aspiration. A high score means the capability is defined, repeatable, used and improving.

| Capability element                 | 1-5 | Evidence of current practice | Customer-experience evidence | Priority |
|------------------------------------|-----|------------------------------|------------------------------|----------|
| Strategic intent                   |     |                              |                              |          |
| Account selection discipline       |     |                              |                              |          |
| SAM role clarity                   |     |                              |                              |          |
| Skills and behaviours              |     |                              |                              |          |
| Cross-functional operating model   |     |                              |                              |          |
| Executive sponsorship capability   |     |                              |                              |          |
| Governance rhythm                  |     |                              |                              |          |
| Value evidence discipline          |     |                              |                              |          |
| Technology and AI enablement       |     |                              |                              |          |
| Coaching, learning and improvement |     |                              |                              |          |

*Scoring guide: 1 = largely absent; 2 = inconsistent / person-dependent; 3 = defined but uneven; 4 = repeatable and well used; 5 = embedded, evidenced and continuously improved.*

## 4. Capability Deep Dive - Elements 1 to 5

| Element                          | Assessment statement                                                                   | Score     | Evidence | Action |
|----------------------------------|----------------------------------------------------------------------------------------|-----------|----------|--------|
| Strategic intent                 | Mutual-value purpose is explicit.                                                      | 1 2 3 4 5 |          |        |
| Strategic intent                 | SAM supports wider business strategy.                                                  | 1 2 3 4 5 |          |        |
| Strategic intent                 | Strategic attention involves real choices and trade-offs.                              | 1 2 3 4 5 |          |        |
| Account selection discipline     | Selection goes beyond current revenue.                                                 | 1 2 3 4 5 |          |        |
| Account selection discipline     | Future value, mutuality, risk, cost to serve and right to win are considered.          | 1 2 3 4 5 |          |        |
| Account selection discipline     | Strategic status is periodically reviewed.                                             | 1 2 3 4 5 |          |        |
| SAM role clarity                 | The SAM role is explicitly defined.                                                    | 1 2 3 4 5 |          |        |
| SAM role clarity                 | Ownership, influence, escalation and decision rights are clear.                        | 1 2 3 4 5 |          |        |
| SAM role clarity                 | The SAM orchestrates rather than absorbs every unresolved problem.                     | 1 2 3 4 5 |          |        |
| Skills and behaviours            | Capability extends beyond relationship skill.                                          | 1 2 3 4 5 |          |        |
| Skills and behaviours            | SAMs demonstrate commercial judgement, customer insight and stakeholder understanding. | 1 2 3 4 5 |          |        |
| Skills and behaviours            | Development needs are assessed and acted on.                                           | 1 2 3 4 5 |          |        |
| Cross-functional operating model | Functions know when and how to engage.                                                 | 1 2 3 4 5 |          |        |
| Cross-functional operating model | Customer commitments have organisational owners.                                       | 1 2 3 4 5 |          |        |
| Cross-functional operating model | The customer experiences coordinated rather than fragmented behaviour.                 | 1 2 3 4 5 |          |        |

## 5. Capability Deep Dive - Elements 6 to 10

| Element                            | Assessment statement                                                                      | Score     | Evidence | Action |
|------------------------------------|-------------------------------------------------------------------------------------------|-----------|----------|--------|
| Executive sponsorship capability   | Sponsors have a clear purpose, not a decorative title.                                    | 1 2 3 4 5 |          |        |
| Executive sponsorship capability   | Senior attention is useful to the customer.                                               | 1 2 3 4 5 |          |        |
| Executive sponsorship capability   | Sponsors are briefed, active and accountable.                                             | 1 2 3 4 5 |          |        |
| Governance rhythm                  | Strategic accounts are reviewed through a defined rhythm.                                 | 1 2 3 4 5 |          |        |
| Governance rhythm                  | Reviews focus on decisions, value and future priorities - not only operational reporting. | 1 2 3 4 5 |          |        |
| Governance rhythm                  | Actions and investment decisions are followed through.                                    | 1 2 3 4 5 |          |        |
| Value evidence discipline          | Value created is captured.                                                                | 1 2 3 4 5 |          |        |
| Value evidence discipline          | Evidence is translated into customer-recognised outcomes.                                 | 1 2 3 4 5 |          |        |
| Value evidence discipline          | The right stakeholders recognise and remember the value.                                  | 1 2 3 4 5 |          |        |
| Technology and AI enablement       | CRM, data and analytics improve customer understanding and decision quality.              | 1 2 3 4 5 |          |        |
| Technology and AI enablement       | Automation protects scarce human attention.                                               | 1 2 3 4 5 |          |        |
| Technology and AI enablement       | AI supports preparation and insight without replacing judgement.                          | 1 2 3 4 5 |          |        |
| Coaching, learning and improvement | SAMs receive challenge, feedback and practical support.                                   | 1 2 3 4 5 |          |        |
| Coaching, learning and improvement | The organisation learns from wins, losses and stalled relationships.                      | 1 2 3 4 5 |          |        |
| Coaching, learning and improvement | Useful practice is shared across accounts.                                                | 1 2 3 4 5 |          |        |

## 6. Strategic Account Service Quality Diagnostic

A strategic relationship cannot compensate indefinitely for unreliable operational delivery. Assess whether the service foundation is strong enough to support strategic attention.

| Service-quality statement                                                            | Score 1-5 | Evidence / example | Systemic action required |
|--------------------------------------------------------------------------------------|-----------|--------------------|--------------------------|
| Core commitments are reliably delivered.                                             |           |                    |                          |
| Recurring service failures are solved systemically rather than repeatedly escalated. |           |                    |                          |
| The SAM is not routinely compensating for weak operational ownership.                |           |                    |                          |
| Service issues have clear owners and resolution paths.                               |           |                    |                          |
| Operational data is trusted and available.                                           |           |                    |                          |
| The customer experiences joined-up ownership across functions.                       |           |                    |                          |
| Strategic conversations are not repeatedly displaced by avoidable service recovery.  |           |                    |                          |
| Lessons from service failures feed improvement.                                      |           |                    |                          |

### Service Foundation Decision

| Question                                                                          | Decision / evidence |
|-----------------------------------------------------------------------------------|---------------------|
| Is service performance sufficiently reliable to support a strategic relationship? |                     |
| Which recurring failures most damage strategic credibility?                       |                     |
| What must be fixed outside the SAM role?                                          |                     |

## 7. SAM Role Clarity and Decision Rights Canvas

Define explicitly what the Strategic Account Manager owns, influences, escalates, measures and can challenge. This protects the role from becoming a bucket for unresolved organisational problems.

| Area                          | What the SAM does | What another function owns | Decision / escalation boundary |
|-------------------------------|-------------------|----------------------------|--------------------------------|
| Customer insight              |                   |                            |                                |
| Account strategy              |                   |                            |                                |
| Commercial decisions          |                   |                            |                                |
| Service and delivery          |                   |                            |                                |
| Executive relationships       |                   |                            |                                |
| Cross-functional coordination |                   |                            |                                |
| Value evidence                |                   |                            |                                |
| Innovation / investment       |                   |                            |                                |
| Risk and conflict             |                   |                            |                                |
| Governance                    |                   |                            |                                |

Decision Rights

| Decision type                | SAM can decide | SAM recommends | Leadership / function decides |
|------------------------------|----------------|----------------|-------------------------------|
| Strategic account priorities |                |                |                               |
| Resource request             |                |                |                               |
| Commercial concession        |                |                |                               |
| Customer commitment          |                |                |                               |
| Escalation                   |                |                |                               |
| Innovation investment        |                |                |                               |

## 8. Strategic Account Manager Skills and Behaviours Self-Assessment

| Capability                | Current 1-5 | Evidence | Target | Development action |
|---------------------------|-------------|----------|--------|--------------------|
| Commercial judgement      |             |          |        |                    |
| Customer insight          |             |          |        |                    |
| Stakeholder understanding |             |          |        |                    |
| Internal influence        |             |          |        |                    |
| Value orchestration       |             |          |        |                    |
| Challenging assumptions   |             |          |        |                    |
| Mutual-value thinking     |             |          |        |                    |
| Value evidence            |             |          |        |                    |
| Executive communication   |             |          |        |                    |
| Learning agility          |             |          |        |                    |

### Development Priorities

| Priority capability | Why it matters | Development method | Support needed | Review date |
|---------------------|----------------|--------------------|----------------|-------------|
|                     |                |                    |                |             |
|                     |                |                    |                |             |
|                     |                |                    |                |             |
|                     |                |                    |                |             |

## 9. SAM Orchestration Capability Assessment

Assess whether SAMs operate as organisational orchestrators rather than individual relationship heroes.

| Orchestration behaviour                                                          | Score 1-5 | Evidence | Improvement |
|----------------------------------------------------------------------------------|-----------|----------|-------------|
| Makes customer needs and organisational gaps visible.                            |           |          |             |
| Secures the right attention from the right people for a clear purpose.           |           |          |             |
| Translates customer context into internal relevance.                             |           |          |             |
| Challenges internal assumptions with customer evidence.                          |           |          |             |
| Protects mutual value rather than advocating only for one side.                  |           |          |             |
| Builds shared understanding rather than hoarding customer knowledge.             |           |          |             |
| Makes value created visible and memorable.                                       |           |          |             |
| Escalates specific capability gaps rather than vague lack-of-support complaints. |           |          |             |

## 10. Leadership Attention Diagnostic

| Leadership behaviour                                                                   | Score 1-5 | Evidence | Action |
|----------------------------------------------------------------------------------------|-----------|----------|--------|
| Leadership asks questions that reinforce customer-recognised value.                    |           |          |        |
| Leadership rewards selective strategic attention rather than indiscriminate pursuit.   |           |          |        |
| Leaders protect SAM from short-term behaviour that undermines strategic relationships. |           |          |        |
| Executive sponsorship receives real time and preparation.                              |           |          |        |
| Resource decisions reflect strategic-account priorities.                               |           |          |        |
| Leaders challenge weak evidence and supplier-centric assumptions.                      |           |          |        |
| Leaders expect cross-functional ownership of strategic relationships.                  |           |          |        |
| Leaders review whether the SAM system is improving, not only whether targets were hit. |           |          |        |

## 11. What the Customer Experiences

Customers do not experience the capability architecture as an internal framework. They experience whether the organisation behaves coherently and creates value they recognise.

| Customer-experience test                                      | Evidence we have | Customer evidence / voice | Gap | Action |
|---------------------------------------------------------------|------------------|---------------------------|-----|--------|
| Promises are kept.                                            |                  |                           |     |        |
| Service is reliable.                                          |                  |                           |     |        |
| Senior attention is useful.                                   |                  |                           |     |        |
| Problems are solved.                                          |                  |                           |     |        |
| Decisions are made.                                           |                  |                           |     |        |
| We understand the customer's world.                           |                  |                           |     |        |
| We make the customer's work easier rather than harder.        |                  |                           |     |        |
| Value created is visible and recognisable.                    |                  |                           |     |        |
| Functions behave as one organisation around the relationship. |                  |                           |     |        |
| Strategic attention feels relevant rather than performative.  |                  |                           |     |        |

**Capability is credible only when internal discipline changes the quality experienced by the customer.**

## 12. SAM Capability Diagnostic and Build Planner

Bring the assessment together. Prioritise capability gaps by maturity, customer impact and the organisational effort required to improve them.

| Capability element                 | Current maturity<br>1-5 | Customer impact<br>H/M/L | Priority H/M/L | Next-stage action |
|------------------------------------|-------------------------|--------------------------|----------------|-------------------|
| Strategic intent                   |                         |                          |                |                   |
| Account selection discipline       |                         |                          |                |                   |
| SAM role clarity                   |                         |                          |                |                   |
| Skills and behaviours              |                         |                          |                |                   |
| Cross-functional operating model   |                         |                          |                |                   |
| Executive sponsorship capability   |                         |                          |                |                   |
| Governance rhythm                  |                         |                          |                |                   |
| Value evidence discipline          |                         |                          |                |                   |
| Technology and AI enablement       |                         |                          |                |                   |
| Coaching, learning and improvement |                         |                          |                |                   |

## Top Capability Gaps

| Priority | Gap | Why it matters | Evidence | First build decision |
|----------|-----|----------------|----------|----------------------|
| 1        |     |                |          |                      |
| 2        |     |                |          |                      |
| 3        |     |                |          |                      |
| 4        |     |                |          |                      |
| 5        |     |                |          |                      |

## 13. Staged SAM Capability Build

Do not try to build everything at once. Sequence the work so that each stage strengthens the operating system around strategic accounts.

| Build horizon | Primary objective           | Capabilities to strengthen | Concrete outputs | Success evidence |
|---------------|-----------------------------|----------------------------|------------------|------------------|
| 0-30 days     | Clarify and stabilise       |                            |                  |                  |
| 31-60 days    | Embed repeatable discipline |                            |                  |                  |
| 61-90 days    | Activate and learn          |                            |                  |                  |
| 3-6 months    | Scale and improve           |                            |                  |                  |
| 6-12 months   | Institutionalise capability |                            |                  |                  |

Dependencies and Risks

| Dependency / risk | Why it matters | Owner | Mitigation / decision |
|-------------------|----------------|-------|-----------------------|
|                   |                |       |                       |
|                   |                |       |                       |
|                   |                |       |                       |
|                   |                |       |                       |
|                   |                |       |                       |
|                   |                |       |                       |

## 14. 90-Day SAM Activation Plan

| Priority change | Why it matters | Owner | People involved | First action | Evidence of progress | Date |
|-----------------|----------------|-------|-----------------|--------------|----------------------|------|
|                 |                |       |                 |              |                      |      |
|                 |                |       |                 |              |                      |      |
|                 |                |       |                 |              |                      |      |
|                 |                |       |                 |              |                      |      |
|                 |                |       |                 |              |                      |      |
|                 |                |       |                 |              |                      |      |
|                 |                |       |                 |              |                      |      |
|                 |                |       |                 |              |                      |      |

## 30-Day Review

| Review question                           | Answer / evidence |
|-------------------------------------------|-------------------|
| What changed?                             |                   |
| What remains person-dependent?            |                   |
| What has improved for the customer?       |                   |
| What leadership decision is now required? |                   |

60-Day Review

| Review question                                   | Answer / evidence |
|---------------------------------------------------|-------------------|
| Which practices are becoming repeatable?          |                   |
| Where is cross-functional ownership still weak?   |                   |
| What evidence shows improved strategic attention? |                   |

## 15. 90-Day Review and Capability Reset

| Review question                                         | Evidence / decision |
|---------------------------------------------------------|---------------------|
| Which capability elements improved most?                |                     |
| Which gaps remain material?                             |                     |
| Where are we still relying on heroics?                  |                     |
| What has the customer actually experienced differently? |                     |
| What should we stop doing?                              |                     |
| What should we standardise?                             |                     |
| What should leadership reinforce next?                  |                     |
| What becomes the next 90-day capability priority?       |                     |

### Capability Commitment

**Strategic Account Management becomes durable when the organisation can choose strategic accounts, invest attention, align functions, sponsor relationships, govern value, evidence outcomes and learn over time - without depending on one heroic account manager.**

**Primary supporting chapter: Chapter 11 - The Organisation Behind the Account Manager.**

Designed for reuse in Chapter 22 - Building the Strategic Account Capability; Chapter 23 - Leading the SAM Organisation; and Chapter 24 - Making SAM Work in the Real World.