

WHERE VALUE LIVES

VALUE ORCHESTRATION WORKBOOK

Executive Implementation Resource

Resource	Details
Permanent Deliverable	DEL-000007
Supporting Chapter	Chapter 10 - The Strategic Account Manager as Value Orchestrator
Book	Where Value Lives
Customer outputs	Editable DOCX + Print PDF

A practical working resource for moving from account-manager heroics to disciplined value orchestration.

Designed for Strategic Account Managers working individually or with a cross-functional account team.

How to Use This Workbook

Chapter 10 argues that the Strategic Account Manager should not become the organisation's universal fixer. The role is to help the organisation understand the customer's world, translate capability into relevance, coordinate organisational attention, challenge assumptions, protect mutual value and preserve evidence of value. This workbook turns those ideas into a practical account-level operating routine.

- Complete the Overload Diagnostic first. It shows where your time is being consumed by work that should be orchestrated rather than personally absorbed.
- Use the Role Assessment to identify which of the six orchestration roles need strengthening.
- Use the Customer World Interpretation Canvas before important internal planning or customer conversations.
- Use the Value Orchestration Canvas to connect supplier capability to customer context, outcomes and evidence.
- Use the Organisational Attention Planner to request scarce internal attention deliberately rather than through habitual escalation.
- Finish with the 30-Day Orchestration Action Plan and revisit it during account reviews.

1. Strategic Account Manager Overload Diagnostic

The purpose of this diagnostic is not to measure how busy you are. It is to identify whether the strategic relationship depends too heavily on you personally. Rate each statement from 1 (rarely true) to 5 (consistently true).

Overload indicator	Rating
I personally chase internal teams for routine customer actions.	1 2 3 4 5
I frequently compensate for weaknesses in service, billing, support or implementation.	1 2 3 4 5
Important customer knowledge sits mainly with me rather than being shared across the organisation.	1 2 3 4 5
I am pulled into operational issues that should be resolved through normal organisational capability.	1 2 3 4 5
Senior relationships depend on me maintaining them rather than on a functioning sponsorship system.	1 2 3 4 5
I spend more time reacting to issues than interpreting changes in the customer's world.	1 2 3 4 5
I find it difficult to secure the right internal expertise at the right time.	1 2 3 4 5
I carry customer commitments that other functions do not fully understand or own.	1 2 3 4 5
The customer would experience disruption if I were unavailable for several weeks.	1 2 3 4 5
My workload leaves too little time for value creation, evidence and strategic thinking.	1 2 3 4 5

Interpretation: a high score is not evidence of commitment or strategic importance. It may indicate organisational dependency on individual heroics.

1. Strategic Account Manager Overload Diagnostic

Reflection

Reflection	Your notes
Which three activities consume the most time but create the least strategic value?	
Which recurring problems should be solved systemically rather than repeatedly by you?	
What work should be owned by another function?	
Where does the customer currently depend on you rather than on the organisation?	

2. The Value Orchestrator Role Assessment

Assess your current effectiveness across the six practical roles described in Chapter 10. Use 1 (weak/inconsistent) to 5 (strong/repeatable).

Role	Working definition	1-5	Evidence / gap
Interpreter of the Customer's World	I turn customer information into contextual understanding: pressures, priorities, risk, stakeholders and changing definitions of value.		
Translator of Supplier Capability	I connect what our organisation can do to outcomes that matter in the customer's world.		
Conductor of Organisational Attention	I secure the right internal attention, from the right people, for a clear purpose and duration.		
Challenger of Internal Assumption	I test internal beliefs against customer evidence instead of allowing supplier assumptions to harden into 'facts'.		
Guardian of Mutual Value	I protect the customer's value and our own organisation's legitimate return, capacity and sustainability.		
Builder of Value Memory	I make sure value created is evidenced, recognised and remembered by the people who matter.		

Development priority	What must change?	First action	By when?

3. Customer World Interpretation Canvas

Use this canvas to move beyond customer information and ask what the information means in context.

Interpretation question	Evidence / observations	What it may mean for the account
What is changing in the customer's world?		
Which pressures are increasing?		
What are the customer's strategic priorities?		
Who matters and why?		
What risks are emerging, and who carries them?		
What are the customer's own customers demanding?		
What constraints, politics or dependencies shape decisions?		
What language is the customer using to describe value?		
What are we assuming rather than knowing?		

Interpretation discipline: do not stop at 'what did the customer say?' Ask what sits behind the statement, who sees it differently, what evidence supports it and what response would be relevant.

4. Value Orchestration Canvas

This is the core working canvas. It connects customer context to organisational capability and customer-recognised value.

Our capability	Customer context	Customer pressure / need	Relevant customer outcome	Evidence

4A. Internal Assumption Challenge

Internal assumption	Evidence supporting it	Customer evidence	What might we be missing?	Action / test

4B. Mutual Value Guardian

Question	Assessment / evidence	Action
What value is the customer receiving?		
How does the customer recognise that value?		
What legitimate value must our organisation receive?		
Where is the relationship becoming unbalanced?		
What should we protect, renegotiate, stop or invest in?		

4C. Value Memory

Use the sequence: VALUE CREATED -> EVIDENCE CAPTURED -> VALUE RECOGNISED -> VALUE REMEMBERED.

Value / outcome	Evidence captured	Who recognises it?	Customer-language outcome	Who else needs to know?	How will it be remembered?

5. Organisational Attention Planner

Attention is scarce. Use this planner to make an explicit case for organisational attention rather than treating every issue as an escalation.

Attention required	Why needed?	When?	Duration	Customer value sought	Evidence / justification	Decision

Decision options may include: invest now; schedule; delegate; solve systemically; monitor; decline.

6. Role Shift - From Heroics to Orchestration

Move away from...	Move towards...	What this means in my account
Fixer	Orchestrator	
Messenger	Interpreter	
Chaser	Conductor	
Customer advocate only	Guardian of mutual value	
Keeper of information	Builder of shared understanding	
Reporter of activity	Builder of value memory	

7. 30-Day Value Orchestration Action Plan

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

Use the action plan during account reviews. Focus on changes that reduce dependency on individual heroics and strengthen repeatable organisational capability.

8. Account Review Questions

- What has changed in the customer's world since the last review?
- Which internal assumptions have been confirmed, challenged or disproved?
- Where is organisational attention currently being consumed, and is that attention justified?
- What customer-recognised value have we created since the last review?
- What value has been created but is not yet recognised or remembered?
- Where is the relationship dependent on individual heroics?
- What capability should the organisation strengthen so the account manager does not become the system?
- What is the single most important orchestration decision for the next 30 days?

Review Notes

Observation / decision	Evidence	Owner / next action

Closing Principle

The Strategic Account Manager is not there to be the organisation. The role is to make the organisation more capable of serving the strategic relationship.

Use this workbook as a living operating tool. The aim is not to complete every box. The aim is to improve judgement about customer context, organisational attention and mutual value.

Supporting Chapter 10 - The Strategic Account Manager as Value Orchestrator