
WHERE VALUE LIVES

EXECUTIVE IMPLEMENTATION TOOL

90-Day SAM Activation Sprint Workbook

A minimum-viable implementation discipline for turning Strategic Account Management intent into visible customer value, organisational learning and practical momentum.

SUPPORTING CHAPTER 24

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How to Use This Workbook

Use this workbook to activate Strategic Account Management in a small pilot over 90 days. It is not a promise to transform everything in one quarter. It is a disciplined way to create early evidence, expose barriers, learn what works and decide what should happen next.

CORE PRINCIPLE

Make SAM simple enough to use, disciplined enough to matter, and human enough for customers to feel the difference.

Minimum-viable discipline

START SMALL — Choose a credible pilot rather than launching everywhere.

USE WHAT EXISTS — Coordinate the established WVL tools; do not recreate them here.

MAKE IT LIVE — Update plans, evidence and decisions through the rhythm of work.

SHOW THE CUSTOMER — Look for changes the customer can experience, not internal activity alone.

LEARN HONESTLY — Treat discomfort, resistance and gaps as diagnosis rather than failure.

Evidence labels

DIRECT EVIDENCE	Observed data, customer feedback, behaviour or decision.
REASONABLE INFERENCE	Several signals support the view; confirmation is still needed.
ASSUMPTION	A belief the sprint must test.
UNKNOWN	A material gap that remains open.

The 90-Day SAM Activation Sprint

The ten disciplines below form one connected implementation cycle. Sequence them pragmatically, but do not skip the choices, governance and evidence that give SAM its spine.

1. Choose pilot accounts	6. Clarify investment choices
2. Confirm strategic intent	7. Build living one-page account plans
3. Appoint and brief SAMs	8. Appoint useful executive sponsors
4. Map customer context	9. Establish a governance rhythm
5. Map stakeholders and the real buying centre	10. Capture first value evidence and next actions

Suggested cadence

Days 1–30	Days 31–60	Days 61–90
Sprint leader and executive owner		
Pilot start date / day-30 / day-60 / day-90 dates		
What success would look and feel like to the customer		
Greatest known implementation risk		

1. Choose Pilot Accounts

Start with a small, defensible pilot. Five to ten accounts may be appropriate; fewer can be better when capacity is constrained.

STEP 1 QUESTION

Where can disciplined attention create meaningful learning and credible value?

Working record

Pilot selection criteria
Accounts considered and excluded
Capacity available for each selected account
Customer readiness and mutuality signals

Decision and action record

Account	Why strategic	Readiness	Capacity	Decision
COMPLETION TEST Can leadership explain why every pilot account deserves differentiated attention?				

2. Confirm Strategic Intent

Give each pilot account a clear intent. Ambiguity here creates activity without strategic direction.

STEP 2 QUESTION

What are we trying to protect, grow, learn, repair or change?

Working record

Strategic purpose of the relationship
Customer outcomes we seek to enable
Supplier outcomes that make investment legitimate
Boundaries: what this sprint will not attempt

Decision and action record

Account	Strategic intent	Customer outcome	Supplier outcome	Owner
COMPLETION TEST Is the intent specific enough to guide choices and stop low-value work?				

3. Appoint and Brief SAMs

Appoint SAMs for judgement, influence and integrative leadership—not merely account administration.

STEP 3 QUESTION
Who will hold the account system together, and what authority and support do they have?

Working record

SAM role and mandate
Decision rights and escalation route
Time, data and functional support available
Capability or confidence gap requiring support

Decision and action record

SAM / account	Mandate	Support needed	Leadership action	By when
COMPLETION TEST Can the SAM describe the role, authority, support and first priorities clearly?				

4. Map Customer Context

Build outside-in understanding before proposing activity. Separate evidence from inference and assumption.

STEP 4 QUESTION

What is changing in the customer’s world, and why does it matter now?

Working record

Strategic priorities and pressures
External, operational and financial context
Where value is being created, lost, delayed or trapped
Critical unknowns and how they will be tested

Decision and action record

Context signal	Why it matters	Evidence label	Source / test	Implication
COMPLETION TEST Can the team explain the customer’s world without beginning with its own offer?				

5. Map Stakeholders and the Real Buying Centre

Go beyond the organisation chart. Map formal and informal influence, protected outcomes, scepticism and gaps.

STEP 5 QUESTION

Who shapes value, risk, adoption and decisions in practice?

Working record

Value beneficiaries and users
Decision makers, approvers and investment defenders
Influencers, blockers and informal connectors
Missing relationships and priority engagement

Decision and action record

Stakeholder	Role in system	Protected outcome	Position	Next move

COMPLETION TEST

Does the map explain how a real decision and adoption would happen?

6. Clarify Investment Choices

Match investment to strategic intent, mutuality, readiness and credible opportunity—not revenue alone.

STEP 6 QUESTION

What level and kind of attention does this account deserve?

Working record

Current choice: Protect / Grow / Incubate / Repair / Maintain / Exit or simplify
Evidence supporting the choice
Investment required and displaced activity
Conditions that would change the choice

Decision and action record

Account	Choice	Investment	Return sought	Review trigger
COMPLETION TEST				
Is the investment choice explicit, evidence-based and resourced?				

7. Build Living One-Page Account Plans

Use the existing Living Account Plan. The plan is a decision surface, not a static document or archive.

STEP 7 QUESTION

What must the team see, decide and update together?

Working record

Customer world and value priorities
Current position and recognised value evidence
Stakeholders, opportunities, risks and friction
Investment choice, mutual objectives, governance and next actions

Decision and action record

Account	Plan owner	Last updated	Decision needed	Next update
COMPLETION TEST Is the plan being used to improve choices, alignment and customer action?				

8. Appoint Useful Executive Sponsors

Use sponsors only where they have a purposeful role. Seniority without preparation or follow-through is decorative sponsorship.

STEP 8 QUESTION

Where can senior attention remove barriers or strengthen customer value?

Working record

Why a sponsor is needed
Customer counterpart and relationship purpose
Sponsor briefing and boundaries
Specific barrier, decision or value conversation

Decision and action record

Account	Sponsor	Purpose	Next interaction	Briefing owner
COMPLETION TEST Does the sponsor know what useful contribution looks like before the interaction?				

9. Establish a Governance Rhythm

Governance should create movement. Meetings without decision purpose merely add ceremony.

STEP 9 QUESTION

Which conversations will make decisions, remove barriers and preserve learning?

Working record

Fortnightly internal pulse
Monthly leadership check
Customer value conversation where appropriate
Sponsor briefing and 90-day learning review

Decision and action record

Rhythm	Participants	Decision purpose	Owner	Next date
COMPLETION TEST				
Does each forum have a distinct decision or learning purpose?				

10. Capture First Value Evidence and Next Actions

Capture early evidence in the customer’s language. Internal completion is not the same as customer-visible value.

STEP 10 QUESTION
What has changed, who recognises it and what should happen next?

Working record

Customer-visible change
Value recognised and by whom
Evidence source and confidence
Next mutual action, owner and timing

Decision and action record

Account	Evidence / change	Recognition	Next action	Owner / date
COMPLETION TEST Would relevant customer stakeholders recognise the progress described?				

Minimum-Viable SAM Toolkit Coordinator

Use this page to coordinate the existing tools. Link to or attach the current source; do not rebuild component tools inside this workbook.

Existing tool	Owner	Location / link	Status	Next use
Strategic Account Selection Sheet				
Living Account Plan				
Stakeholder Value Map				
Real Buying Centre Map				
Value Evidence Log				
Executive Sponsor Briefing Note				
Quarterly Customer Value Review Template				
90-Day Action Tracker				
AI-supported Account Briefing Prompt				
Pilot Learning Review				
TOOLKIT TEST The toolkit is successful when it improves preparation, judgement, alignment and follow-through—not when every box contains a document.				

Sprint Governance and Action Tracker

Sprint executive owner
Sprint leader
Current phase and review date
Most important decision now
Barrier requiring leadership attention

90-day action tracker

Action	Account / customer outcome	Owner	By when	Status	Evidence / decision

Decision log

Date	Decision	Rationale / evidence	Owner	Review trigger

Early Progress and Evidence Dashboard

Balance commercial outcomes with leading evidence that SAM discipline and customer experience are changing. Avoid claiming maturity because tools have been completed.

Leading evidence

Indicator	Baseline	Now	Evidence / source	Next threshold

Commercial and relationship signals

Measure	Baseline	Current	Trend	Comment / implication

POSSIBLE MEASURES
Selection quality; strategic intent; customer context; stakeholder gaps; sponsor usefulness; governance decisions; recognised value evidence; better conversations; live plans; stopped low-value activity; retention, margin, share of wallet, renewal risk, opportunity quality and pipeline.

Twelve Traps to Surface Early

1. Too many accounts	Reduce the pilot or increase real capacity.	Signal / action:
2. Revenue-only status	Revisit strategic fit, mutuality and readiness.	Signal / action:
3. Account plans as documents	Use plans in live decisions and reviews.	Signal / action:
4. Decorative sponsorship	Give sponsors a purpose, brief and follow-through.	Signal / action:
5. Governance without decisions	Define the decision purpose of every forum.	Signal / action:
6. Value without evidence	Capture evidence the customer recognises.	Signal / action:
7. Sales-only ownership	Create functional ownership around customer value.	Signal / action:
8. Over-engineering	Return to minimum-viable disciplines.	Signal / action:
9. Impatience	Judge learning and leading evidence appropriately.	Signal / action:
10. Tool-first implementation	Lead with behaviour, choices and customer change.	Signal / action:
11. No customer-visible change	Ask what the customer experiences differently.	Signal / action:
12. Weak leadership reinforcement	Make attention, decisions and trade-offs visible.	Signal / action:
LEADERSHIP STANDARD Do not scale confusion. Treat uncomfortable evidence as a route to stronger implementation.		

30 / 60 / 90-Day Reviews

DAY 30 — FOUNDATION

REVIEW FOCUS

What is clearer? Which choices are still vague? What capacity or ownership barrier has surfaced?

Evidence and examples
Decision taken
Barrier removed or escalated
Next 30-day commitment

DAY 60 — PRACTICE

REVIEW FOCUS

Which disciplines are genuinely live? What is the customer noticing? Where is governance failing to move decisions?

Evidence and examples
Decision taken
Barrier removed or escalated
Next 30-day commitment

DAY 90 — LEARNING

REVIEW FOCUS

What value evidence exists? What did the pilot expose? What should be scaled, adapted, paused or stopped?

Evidence and examples
Decision taken
Barrier removed or escalated
Next 30-day commitment

Pilot Learning Review

End the sprint with honest learning, not a ceremonial success report. The aim is to improve the discipline before expansion.

What changed for customers?
What changed in our decisions, behaviour and collaboration?
Which assumptions were confirmed, challenged or remain unknown?
Which tools and rhythms proved useful—and which created friction?
What capability, capacity or leadership barriers remain?
What should be repeated, adapted, stopped or added?

Scale decision

Decision	Evidence required	Current judgement	Owner	Next review
SCALE TEST Expand only when the pilot has created useful evidence, practical learning and enough organisational readiness to preserve quality.				

Customer-Visible Change Checklist

Implementation matters when the customer experiences a difference. Use this page before claiming progress.

[]	Better preparation and understanding of the customer's world	Evidence:	Next action:
[]	More relevant conversations and fewer supplier-centred presentations	Evidence:	Next action:
[]	Stronger alignment across supplier functions	Evidence:	Next action:
[]	Clearer ownership and follow-through	Evidence:	Next action:
[]	Useful executive attention with a defined purpose	Evidence:	Next action:
[]	Stronger value reviews grounded in evidence	Evidence:	Next action:
[]	Earlier discussion of risk, friction and opportunity	Evidence:	Next action:
[]	Fewer surprises and more transparent decisions	Evidence:	Next action:
[]	Actions that reflect stakeholder realities	Evidence:	Next action:
[]	A relationship that feels easier and more valuable to navigate	Evidence:	Next action:
Customer feedback or language worth preserving			
Most important experience gap to address next			

90-Day Executive Summary

Pilot scope and strategic purpose
What customers experienced differently
Strongest recognised value evidence
Most important implementation learning
Barrier requiring leadership attention
Current capability and readiness judgement
Recommendation: scale / adapt / continue pilot / pause / stop
Next 90-day commitment and decision date

Leadership actions

Action / decision	Why it matters	Owner	By when	Evidence of completion
FINAL STANDARD SAM becomes real through repeated choices, useful rhythms, honest evidence and customer-visible change. A programme can be launched; a discipline must be practised.				