

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?	

Decision	What this means in practice
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

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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 1-5	Customer impact 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			

Build horizon	Primary objective	Capabilities to strengthen	Concrete outputs	Success evidence
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.

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