

# The Business Of Startups, Technology and Digital Healthcare

## MANAGEMENT

### Technical Account Management – Part-1

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1. Avoid communication black outs. This is a must. Please always keep the customer in loop. Whether its pre-sales or post-sales. Your customer needs to be aware of the progress you are making and you have to get his acknowledgment. This is tricky at times when the product is not fully matured yet and we need to fine tune before it starts delivering results. Even then , you have to present this “initial” results and then keep showing progress. This is very important.

If the customer doesnt know what you are working on, how much efforts you have made , he might be compelled to look at another company. You have make that “human” connection and keep him in the loop.

2. Stick to the findings of discovery process: If you deviate from this, customer will not agree when you present the results. The intent of whole “discovery process” is defeated. If you have to change for some reason, you need to get clear acknowledgment from customer.

3. Pre-Sales is very different from Post-Sales . Pre-Sales is to prove that product works and solves customers issues identified in “discovery process”. Deployment is real stress test to the product and can open doors to other products or open doors to the same product with other groups or departments . So the same strategies which worked for pre-sales might not work in deployment.

4. Acct Mgr can use the CRM to identify

1. Which features of given product are not working and feedback that to Product Manager or R&D  
2. Find features which are support intensive. These are areas which indicate that either product might not be matured . This is one area which can adversely affect ROI

5. One has to understand that customers invest in technology ,but what they desire is the product which demonstrates that technology. They don’t buy technology. Anything you deliver which is still not in product form is wasting both yours and customers time & money (ROI) . This is very important when we are trying to turn an key account into strategic account.

6. Train your engr resources so that they can sell your product more effectively. They are kinda micro sales reps who talk to engineers almost everyday. I have seen that engineers open up to them than to the sales managers. So utilize this channel carefully and effectively.

7. Have a account management plan and review it both with the team and with your C-level staff. It is very critical that entire acct team speaks the same language. Members of the acct team cannot have contradicting opinions about the same product. If there are some features of given product which dont work as advertised at some group, then acct manager has to share the information across the team and come up with a plan.

A sample acct plan is provided at the end of this post. This is just a template and depending on the nature & relationship of the account, this has to be modified.

8. An account management template should consist of the following at the minimum :

- a) Acct details : Something like Acct name, Size of account (\$\$\$), TAM (Total Addressable Market), key decision players along with their grp name etc.
- b) Business Objective : What are we trying to do in this acct.
- c) Competition : Whom are we competing against and any info on their sales strategy or strategic position in the company.
- d) Strategy to Win : Our strategy in concise form.
- e) Risks : Risks involved to achieve d)
- f) Discovery : What we know about the customer. What they told us . What we agreed upon . what solns we proposed and what product fits where.
- g) Plan of Action with deadlines and milestones :  
In pre-sales mode,
  - 1. What metrics are we measured against? In semiconductor world, performance/die size etc
  - 2. Where is competition?
  - 3. Who is working on that and what are they working on
  - 3. If we have any issues, what is the current status and expected soln along with dates!
  - 4. Deadline to wrap this and present to customer.

In Deployment mode

- 1. What projects is customer using us? Names of projects/Tape-out schedules , time-lines etc
- 2. Issues vs features list in graphical form like bars/histograms to demonstrate product strengths/weakness, ROI impact at both ends etc
- 3. Any other important detail worth mentioning.

The acct plan is not meant to be a detailed report, but more which reflects the health of the account and gives us ability to focus on which matters most.

9. Resource management. Maximize ROI by develop a coaching plan to junior engrs and use them in deployment mode . Utilize the senior resources on pre-sales activity or on critical issues in deployment mode where the impact on Revenue/Product deployment is huge. This is typically my preferred approach as it not only maximizes ROI for the company , but also gives junior engrs both an opportunity to learn and contribute to product growth, giving them a sense of accomplishment

10. I personally dont like to commit any resources if there is no firm interest or commitment from customer. Actually this goes both ways. I have seen more than twice where sales sell the product and R&D is not committed in delivering. So, while we try to sell a soln to the customer, its very important to get the buy-in from Sr.Management. Once we get the nod, it is very important to set dates & deliverable from R&D and ensure R&D is focused in meeting them. No focus, no results!!

11. Have periodic review meeting with customers and make sure they are on the same page as the acct team. Perception about the product/company matters a lot especially when the sales team is trying to bring in more business from the account. This is also important when we want to turn an account into strategic account.

12. Everyone on the account team has to watch for the competitors at the customer and immediately alert the team. Success of the company or team is measured by how fast failures or news like this is propagated . Timing is everything.

13. Team has to conduct “events” about the deployed products/new products to increase awareness about the product/company. The events can be a lunch seminar, webinars, hands-on workshops etc

14. I have many creative engineers (typically champions or advocates of the product ) come up with cool solutions which increase productivity . Account team has to encourage engineers like these and the customer is now effectively an evangelist. I will write a separate post about this soon.