Version History

Ver. No.	Authors	Date	Reviewers	Review Date	Release Date
1.0	Strategic Account Management Team	27-Aug-2018	QMF	31-Aug-2018	03-Sep-2018
1.1	Strategic Account Management Team	23-Dec-2018	QMF	27-Dec-2018	09-Jan-2019
2.0	Strategic Account Management Team	02-Dec-2019	QMF	13-Dec-2019	16-Dec-2019
3.0	Strategic Account Management Team	02-Nov-2020	QMF	06-Nov-2020	10-Nov-2020

Change History

Ver. No.	Section	Date	Change Information	RFC No.
1.0	All	03-Sep-2018	New Release	-
1.1	9.0	09-Jan-2019	Document updated	-
2.0	All	16-Dec-2019	Annual Review	-
3.0	All	10-Nov-2020	Annual Review	-

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Strategic Account Management (SAM) Process

1.0 Objectives

The objective of this document is to define the process for the Strategic Account Management (SAM) Team.

2.0 Scope

This process applies to all the processes, and / or sub processes under the purview of the Strategic Account Management (SAM) Team.

3.0 Policy

3.1 Policy Statement

- To develop new lines of business
- Develop new technology opportunities
- Leverage the benchmarks to the industry standards

3.2 Framework to Support or Implement this Policy

- The stated policy is implemented as per the procedure mentioned below

4.0 References to (checklists, forms, guidelines, lists, standards, templates, other processes)

Process Element	Description	ID
Checklists	*NA*	
Forms	Quarterly Opportunity Status	QMS-L4-FR-SAM-01
	Customer Feedback (Client specified Format)	QMS-L4-FR-SAM-02
	Training Requirements	QMS-L4-FR-SAM-03
	Risk Management Plan	QMS-L4-FR-MR-03
Guidelines	*NA*	
Lists	*NA*	
Standards	*NA*	
Other Processes	*Proposal*	

5.0 Entry Criteria

Inputs	Source Processes
Customer	
Delivery Team	

6.0 Responsibilities

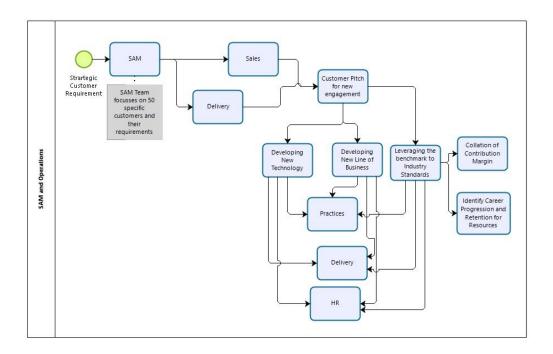| Role	Responsibilities
Account Manager	• Identify requirements for the Strategic Customer
Sales Team	• To initiate the understanding of the requirements from the client
Delivery Team	• Effort and Cost Estimations

Process Description

The team is dedicated to the servicing and maintains customer relationship with client / accounts that are important or are considered to be strategic to the organization. The clients are of strategic importance to the growth of the organization

Overview Diagram

7.1 Procedure for SAM

- The customer initiates a discussion with the SAM, during the monthly or quarterly reviews
- SAM coordinates with the Sales and the Delivery team to prepare the pitch for the new engagement that was initiated from the customer requirement
- The new requirement could be any of the following scenarios
  - o New technology introduction
  - o Developing new Business line
  - o Leveraging the benchmarks to industry standards
- In all the scenarios the SAM will collaborate with the Delivery, Practices, Human Resource (HR), Resourcing, and the Talent Acquisition teams
- Delivery is to provide the possible execution plans
- Practices with best fit solutions
- HR and Talent Acquisition will ensure the number of resources are ready for deployment

- The SAM communicates with the client on a month on month basis, as part of the Business Review Meetings. The meeting are participated by the CTO or the Senior Management cadre
- Based on the requirement of the client for the proposed opportunity, SAM connects with the Training department for technological updates, which are reviewed by the Delivery teams
- SAM team will have a discussion regarding the Customer Feedback during their monthly review with the client
- SAM also has to identify and recommend resources currently placed at the engagements for Technical, Non-Technical, and Project Management trainings. So as to provide opportunity for employee growth and retention with the organization.

7.0 Quality Mechanisms
- Review of customer requirements for new opportunities
- Customer Feedback

8.0 Quality Objectives

Sr. No	Objectives	Responsibility	Frequency of Measurement	Reporting of Measurement	Target to Achieve
1	Define - Improvement & profitability	Manager - SAM	Quarterly	Quarterly SAM Report	80%
2	Specify Timeline & billing impact	Manager - SAM	Monthly	Monthly SAM Report	90%
3	Generate new requirement with multiple business stack	Manager - SAM	Weekly	Open Requirement Report	90%
4	CSAT	Manager - SAM	Yearly	Yearly Review Report	80%
5	Target	Manager - SAM	Monthly	Monthly SAM Report	85%

9.0 Identified Risk
- All risks identified for the process will be recorded into the Risk Management Plan (RMP)
- Risks will be reviewed and monitored as per the agreed schedule

10.0   Exit Criteria

Outputs
Monthly Opportunity Status
Customer Feedback (Client specified Format)
Training Requirements
Risk Management Plan