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# VELOCITY

KNOWLEDGE TO SPEED PAST THE COMPETITION

## FUTURE-READY SAM

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STRATEGIC ACCOUNT MANAGEMENT ASSOCIATION

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# IS YOUR SAM JOURNEY STALLED?

How a Center of Excellence can turn your headaches into success

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In an era of constant change and market complexities, strategic account management (SAM) has evolved into a vital business transformation strategy. Its success, however, hinges on the presence of a robust Center of Excellence (CoE). Far more than a support function, the CoE plays a critical role in embedding SAM within the organization by driving vision, ensuring alignment, enabling consistency, and fostering continuous improvement.

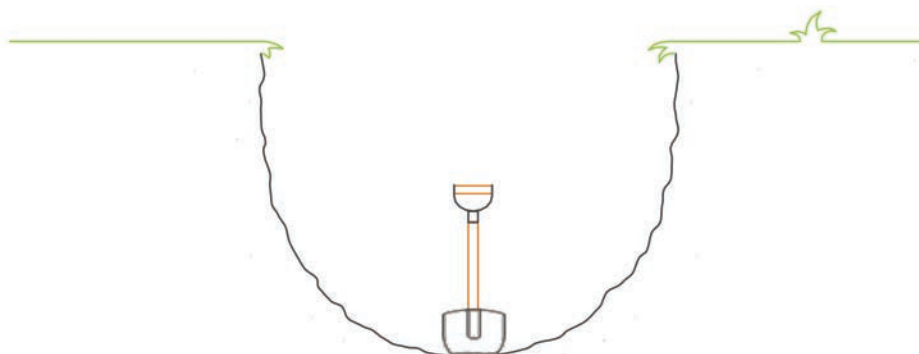
As the strategic nerve center, the CoE unifies cross-functional expertise from teams such as sales, marketing, IT, and operations, while also integrating critical roles in finance, training, and human resources. This diverse composition brings together strategic account managers, change agents, and process experts who provide the vision and framework needed to standardize processes, define methodologies, and create a common language across the organization.

This consistency is essential for building long-term, value-driven relationships with key accounts and advancing the customer-centric journey.

## Why is CoE enablement often overlooked in the SAM journey?

Despite its crucial role, many organizations overlook the CoE in their SAM strategies. Historically, this gap has led to fragmented efforts, inconsistent execution, and a transactional mindset. Without a dedicated CoE, teams struggle to align across functions and fail to embed SAM as a core, sustainable practice — particularly in complex industries and organizations.

### OVERLOOKING CoE CAUSES FRAGMENTED EFFORTS AND INCONSISTENCY



By instilling a customer-first mindset, the CoE ensures that SAM principles not only are adopted but also continuously evolve to meet changing market dynamics. This cultural shift is supported by comprehensive training and development programs, equipping teams with the skills needed to engage deeply and strategically with clients. Without this enablement, organizations remain reactive rather than proactive, missing out on the opportunity to build lasting, strategic partnerships.

A well-composed CoE not only brings together cross-functional collaboration but also champions innovation, ensuring that the SAM journey is adaptable and future-proof. It transforms SAM from a series of initiatives into an organization-wide mindset that permeates all customer-facing activities. It ensures that SAM remains adaptable, helping organizations anticipate and respond to evolving customer needs, leading to sustained growth and long-term success.

In this article, I'd like to share how some of our clients have been able to leverage and evolve their CoE throughout their strategic account management journey.

## Key elements of a successful CoE

Building an effective CoE for SAM involves focusing on four core elements: vision, people, processes, and execution.

**Vision and strategic alignment:** A successful CoE begins with a well-defined vision that aligns with the organization's overarching business strategy. This vision serves as a "North Star," guiding all initiatives and ensuring that efforts are concentrated on areas with the highest potential

impact. By linking the CoE's objectives to the company's goals, organizations can prioritize actions that drive measurable value.

To translate vision into action, the CoE should develop a detailed roadmap outlining specific initiatives, timelines, and milestones. This roadmap acts as a strategic plan, detailing the sequence and timing of the organization's journey towards its goals. It ensures that all stakeholders are aligned and provides a clear path forward.

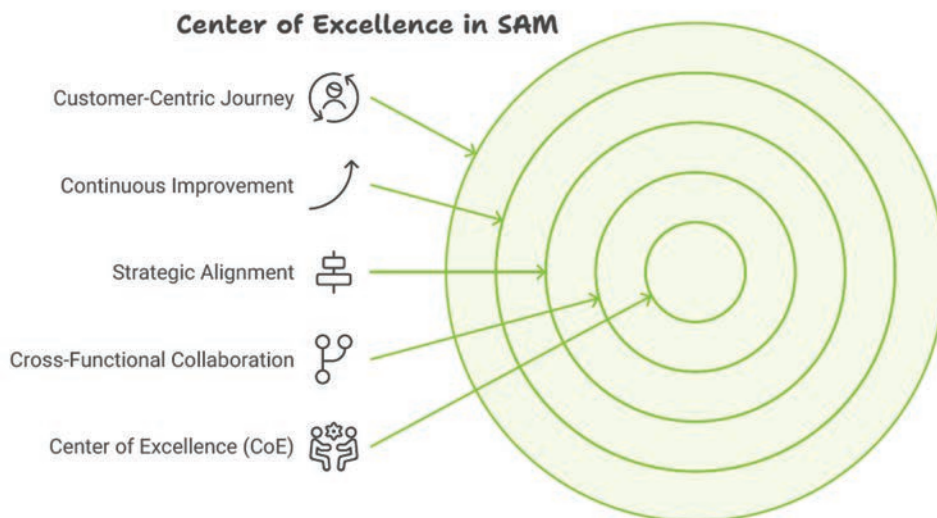
**People:** Success in SAM begins with having the right people in place, from strategic account managers to leadership. The CoE plays a pivotal role in defining the skills and competencies required for SAM roles and ensuring these individuals are supported through continuous development and training. It is essential not just to hire strategically but to foster ongoing growth and learning within the SAM teams. A key takeaway is the importance of middle management — often the gatekeepers of implementation — who must be fully aligned with SAM strategies to avoid bottlenecks and ensure smooth execution across the organization.

"The middle management layer is often missed, but they can really create the top-down and bottom-up alignment necessary for SAM to flourish," said one customer who understands the best practices for successful execution. This perspective highlights the need for continuous engagement with these leaders, ensuring they understand the strategic importance of SAM and their role in its success.

**Processes:** Standardizing processes across the organization is crucial for SAM success. A CoE establishes a common language and set of practices that allow all teams

to work cohesively. This includes defining key SAM terminologies, ensuring consistency in customer engagement strategies, and integrating SAM principles into the broader organizational framework. Clear processes help account managers and support teams collaborate effectively. Focusing on embedding these key terminologies within an organizational culture leads to a unified approach across all business units or pillars.

"We made sure that terms like customer goals and expected returns were not just buzzwords but part





## A ROADMAP TO SUCCESS – CUSTOMER CENTRICITY



A high-level Center of Excellence framework (themes)

of our daily discussions,” said one of our pharmaceutical customers. This commitment to consistent language and practices ensures that all team members are aligned in their understanding and execution of SAM strategies.

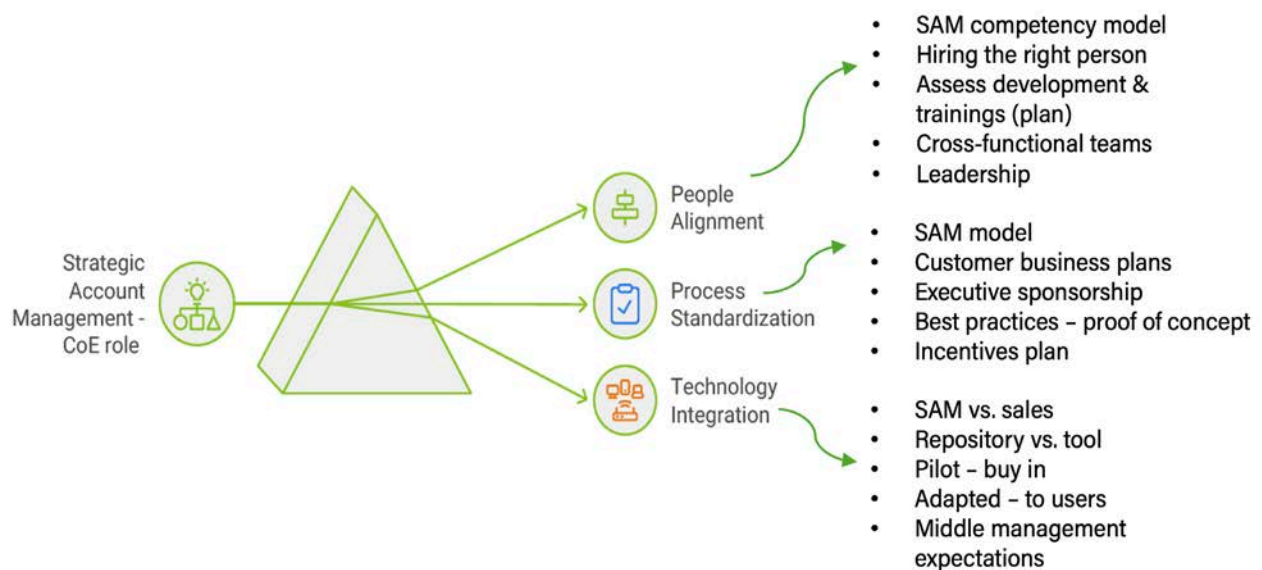
**Execution:** SAM enablement is the backbone that supports the SAM journey. To ensure seamless execution, it’s critical for a common SAM account plan to integrate strategic account management tools with a customer engagement model. Our experience illustrates how a well-evolved SAM methodology and account plan integrated in the right platform can drive more effective customer interactions and streamline relationship management. The journey from a simple tool to a fully integrated SAM way of working highlights the importance of investing in the right capability to support long-term business transformation.

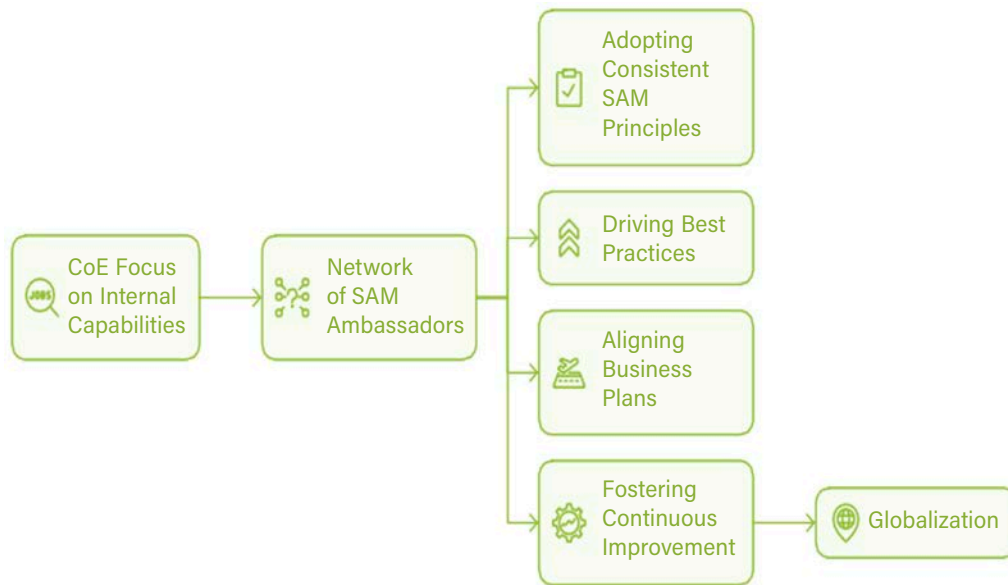
Artificial intelligence also impacts the strategic planning work by providing insight, often challenging the assumptions we have about our knowledge of our most important customers. This helps with the account planning strategy and can be leveraged to create differentiating factors in customer interactions.

“The right enablement and technology is not just about having a tool; it’s about leveraging the team and enablement group and platform to enhance customer relationships and provide actionable insights,” said one organizational leader who employs this strategy. This highlights the necessity for organizations to carefully evaluate and select their SAM methodology and use tools that are pragmatic, unifying, and able to evolve with their strategies and customer needs.

An organization we partnered with offers one compelling example of how a CoE can elevate SAM to a new level. They started by having their SAM efforts fragmented, with processes varying across business units and teams. However, by establishing a dedicated CoE, they unified their approach and ensured that all teams operated with a consistent strategy.

A CoE played a critical role in fostering collaboration between key departments such as commercial excellence, marketing, and sales operations, creating a seamless flow of information and resources. Their CoE focused heavily on building internal capabilities. By developing a strong internal network of SAM ambassadors across various regions and





## Conclusion

A CoE is not just an operational necessity — it is a strategic imperative for organizations looking to transform their SAM approach into a competitive advantage. By focusing on the vision, people, processes, and enablement, a CoE ensures that SAM is executed consistently and effectively across the organization. Some of the case studies we developed highlight the tangible benefits of a well-structured CoE, from enhanced

business units, the CoE ensured that SAM principles were adopted and implemented consistently.

These ambassadors played a key role in driving best practices, ensuring that customer business plans aligned with broader organizational goals and fostered a culture of continuous improvement from global to local — what we refer to as “glocalization” for central guidance and local execution.

“Our SAM ambassadors are crucial in translating the CoE’s vision into local practices, ensuring that each team understands its role in the bigger picture,” said one of our customers. This perspective illustrates how local champions can bridge the gap between global strategy and local execution, making the CoE’s efforts more effective.

In this execution, setting clear KPIs to measure the success of the SAM initiatives is also critical. These include metrics such as the percentage of account managers trained in SAM, the adoption rate of SAM tools, and the frequency of customer interactions. By measuring both program effectiveness and individual performance, the CoE can continuously refine its approach and ensure that SAM remains aligned with business objectives.

“Setting KPIs is essential not just for accountability but for driving behavior change across the organization,” said one of our customers. This highlights the CoE’s role in establishing performance metrics that not only track progress but also encourage the right actions from all team members involved in SAM.

internal collaboration to measurable improvements in customer engagement and business outcomes.

For organizations on the SAM journey, the CoE serves as both a guiding force and a source of innovation, helping to continuously refine and improve the way they engage with their most important customers. By embracing the CoE model, businesses can build deeper, more meaningful relationships with their strategic accounts, driving long-term growth and success.

In summary, the establishment of a CoE for SAM is not merely a theoretical exercise; it is a practical necessity for organizations committed to transforming their customer engagement strategies. As demonstrated by our customers’ success, a well-functioning CoE fosters alignment, enhances collaboration, and drives a culture of continuous improvement that ultimately leads to better outcomes for both the organization and its customers. ■

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