

## *Account Management Execution*



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# Account Management Execution

Success in strategic accounts programs is clearly linked to an investment of sound best practices, good methodology, and superior, disciplined account management execution.

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**ABOUT CPS.** Critical Path Strategies helps clients improve the effectiveness of their sales organization. Our portfolio of services addresses the strategic, organizational, and relationship issues that impact selling performance. Our powerful processes enable clients to transform their sales culture, enhance their competitive position, and accomplish strategic business initiatives. Our clients—emerging companies and members of the Fortune 500 alike—typically measure 100 to 500 times their CPS investment in revenue growth.



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# *Account Management Execution*

*A consulting practice of Critical Path Strategies, Inc.*

March 2003



Research Study by:  
Filigree Consulting  
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## Abstract

This paper examines the current practices of a wide spectrum of sales professionals in their performance against best practices in Account Management Execution. We analyzed the respondents answers to an extensive web-based survey instrument and identified patterns of behavior in the pursuit of delivering value to a company's most important clients. We also examined these patterns and identified four performance-based clusters, their unique attributes, and key differences. The web-based survey was based upon a model developed by Critical Path Strategies.

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## Scope of Study

### Scope

126 respondents

### Participants

A wide spectrum of sales professionals including chief sales officers, sales directors, managers, and strategic account managers.

### Industries

- Industrial
- Information Technology
- Consulting
- Services-Other
- Other Sectors

## Overview

### Executive Overview

Critical Path Strategies (CPS) has launched a program to rate the performance of 15 key elements of “Account Management Execution” (AME) as a part of its continuing efforts to identify high-value areas that lead to successful account management execution.

CPS, in conjunction with Filigree Consulting, is conducting an ongoing assessment of best practices associated with managing commercial and executive relationships with strategic accounts. This white paper is based on the results of 126 assessments of Account Management Execution.

### Key Findings

In the assessment, sales professionals rate their performance on 15 key AME elements and the performance of their strategic accounts relative to other customers.

In general, the participants indicate a very strong relationship between the level of use of AME program elements and the degree of success in strategic accounts. Interestingly, focus on a few specific program elements appears to allow some respondents to have a disproportionately higher level of success.

## Introduction

This research is based on a wide spectrum of sales professionals who completed a Web-based assessment of their use of account management execution elements for their company's most important customers. The assessment was developed by Critical Path Strategies, Inc. to measure a company's account management execution effectiveness based on CPS' AME model.

While these are self-assessments without independent verification and only initial results from the first set of respondents, there does appear to be a good demographic mix that allows the preliminary analysis that is presented in this white paper.

The 126 respondents represent a broad range of industries including Industrial, Information Technology, Consulting, and other Service industries had completed the assessment. 40% of the respondents came from companies with fewer than 1,000 employees. 60% of respondents came from larger companies, with 26% of those being from companies with up to 5,000 employees, 17% from companies with up to 20,000 employees, and 18% in even larger companies. Most respondents held a middle management or executive management position, with the remaining respondents typically in sales line or staff positions.

## Model Value and Use

The AME model (Figure 1) was developed by Critical Path Strategies, Inc. Based on its previous research and extensive strategic account consultation, the CPS team documented its clients' best-practices efforts and developed an assessment. The assessment was tested qualitatively to ensure coverage of key issues and then posted online.

The assessment is intended for sales executives and managers who are seeking to understand best practices in the management of customer-facing teams in strategic accounts and their company's position vis-à-vis established best practices. Account Management is the discipline that defines practices of excellence in such situations. It is based

on the premise of activating a business-to-business strategy at the account level that will produce the highest value recognition and the greatest breakthrough results for both the buyer and seller. The assessment is intended to help sales executives drive extraordinary results in their most important accounts.

Respondents were asked to assess their organization's performance based on the AME model. The AME model incorporates defining a strategic account management model, deploying it, ensuring it aligns with client needs, creating and executing a plan on this basis and then finally, demonstrating value to the client and ensuring that they recognize the value delivered.



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Figure 1. CPS Account Management Execution Model

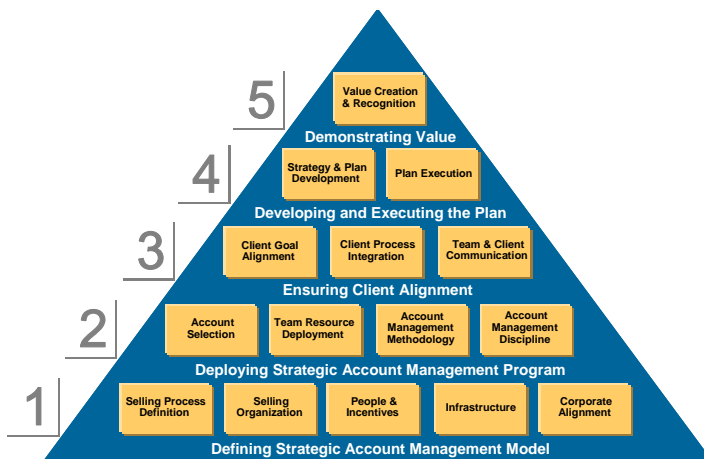
## The Five Major Areas of Account Management Execution

1. **Defining the Strategic Account Management Model.** This section of the assessment gauges the underlying structure of the account management model. Specifically, the survey assesses the process, organization, compensation system, infrastructure, and the alignment of the account management model with a company's strategy and values.
2. **Deploying the Strategic Account Program.** This section of the assessment measures the deployment of the strategic account program. Specifically, we assess your process for selecting accounts for the program, your teaming, and account management methodology and management approach.
3. **Ensuring Client Alignment.** One of the overwhelming characteristics we

have found in high-performance strategic account teams is their almost innate ability to align their value with their client's goals and needs. Further, we have found that this ability can be developed, learned, supported, and institutionalized with a high degree of success. This section of the assessment rates your implementation of methods, tools, and procedures to align and communicate with your clients.

4. **Developing and Executing the Plan.** This section of the assessment deals with the impact of best practices in strategy and plan development and the processes of development and execution of strategies and plans for your strategic customers.

5. **Demonstrating Value.** As is appropriate, we place the customer at the top of the model. Specifically, we focus on the value the customer receives from the selling team's efforts and how well the customer perceives that value. In this section, we assess the business impact of customer-facing teams and account management execution on strategic customers.



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Figure 1. CPS Account Management Execution Model

Each of these layers has multiple elements that are grouped into 15 key elements as shown in Figure 1. The assessment includes several questions about each of the elements. It also includes a self-assessment of the performance of strategic accounts relative to the participant's other customers.

## Account Management Execution: Links to Success

In general, there was a very high level of correlation between how a respondent rated their strategic account program at any specific level of the AME model and their overall AME assessment rating. Consistent performance is consistently rewarded. There is no indication of an ability to skip a level in the model or put less emphasis on the foundational layers and still rate well.

While all program elements had a significant positive relationship to predicting success, a few were stronger predictors. The best predictors of success were focus on value recognition, value delivery, and alignment to the client's goals. These elements are the traditional mainstays of quality client relationships: providing and communicating value, and goal alignment (focusing on the "right" value to deliver).

While every AME program element had a significant relationship with how well respondents did in their overall program ratings, elements dealing with program documentation have a very powerful relationship to both the overall rating and the strategic account measures of success. The combination of rating elements that address documentation factors (defining the sales process, deploying the account management methodology and account strategy and plan development) is one of the strongest indicators of overall program ratings and business success indicated by the participants to date. Apparently, strategic account programs that are based on a strong management system, deployed effectively and aligned with customer goals and directions, gain significant benefit from completing documentation of process, communications, and plans.

High performance in the "documentation" tasks is slightly more frequent in larger organizations (over 500 sales representatives) and in organizations that focus on solutions and services versus products.

## Performance-Based Clusters

Participants were grouped into four performance-based clusters via statistical techniques. Each cluster represents a set of participants that have similar performance rating patterns. The four groups are:

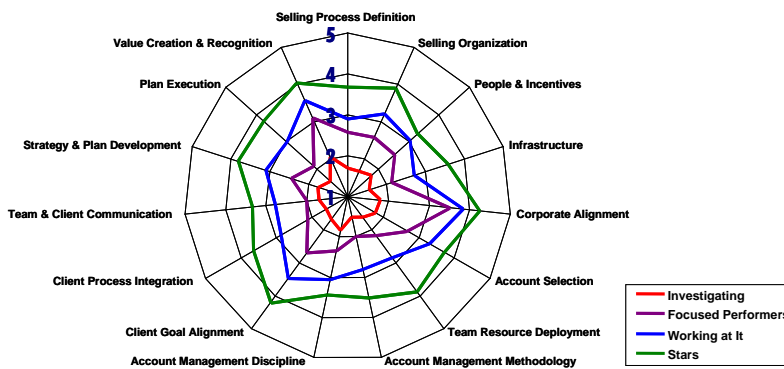


Figure 2. Performance Groups Scores

- “Investigating” – This group has the lowest level of commitment to or involvement in AME;
- “Focused Performers” – These respondents are executing on a subset of the AME elements;
- “Working at It” – The majority of participants in this group have a strategic account program in place, but without the superior execution demonstrated by the top group; and
- “Stars” – Strategic account programs are in place, executing very well, and showing results.

The average scores for each group on each of the 15 AME model elements are depicted in Figure 2. Note that the relative rankings of the four performance groups remain consistent across all 15 elements. All four of these groups show a strong relationship between overall program accomplishment level (performance rating) and strategic account success.

The “Investigating” group (12% of participants) had an overall AME rating of 1.7 on a 1 to 5 scale, reaching a rating of 2 only in the tasks of value creation and recognition. The “Focused Performers” (25% of participants) rated 2.4 overall. Those “Working at It” (40% of participants) rated 3.1, and the “Stars” (23% of participants) rated 3.7, performing above average on every element of AME. In essence, “Stars” do many things well.

Participants rated their business success with their strategic accounts in terms of customer satisfaction, wallet share, growth, sales, general & administrative (SG&A) expense, and quota attainment. Figure 3 depicts the performance groups’ average business success with their strategic accounts. The scale represents, from the left: (1) “strategic accounts never out-perform other accounts,” to (5) “strategic accounts always outperform others”. As one would expect, the strategic account success of those “Investigating” AME is relatively low. “Stars” get a solid payoff from their efforts. But the rewards for “Focused Performers” and those “Working at It” are remarkably similar.

### Investigating

The “Investigating” group (12% of participants) has little focus on AME. These respondents frequently did not have a strategic account program. Their interest in taking a 100+ question assessment may indicate that they are investigating or pre-assessing their performance on key AME elements. Perhaps they are in the program evaluation or baseline stages of strategic account program development.

While 75% of all participants had a strategic account program, 73% of the

## Performance-Based Clusters

“Investigating” group did not. This very large difference came with a hefty penalty in the overall success of their most important accounts. Despite these being the most important accounts for these respondents’ companies, they did not outperform their other accounts very often.

Although there is a broad demographic mix in each of the performance groups,

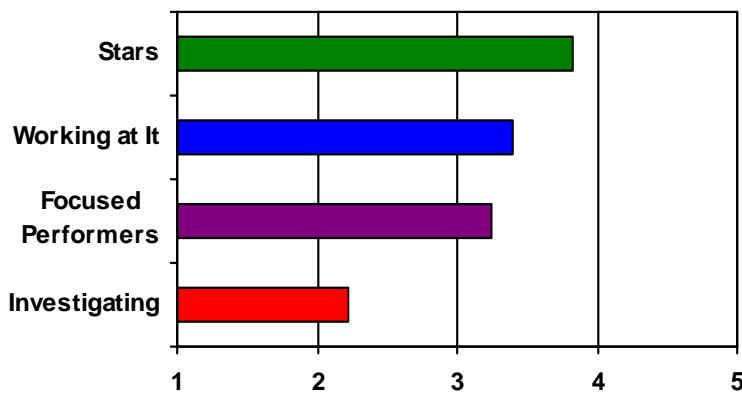


Figure 3. Strategic Account Performance vs. Rest of Company's Accounts

more of the “Investigating” group tended to be from the industrial sector (40% Industrial versus 29% Industrial for all participants). They also came from companies where offering fee-based services was not as prevalent. Almost half of these companies (47%) offered no fee services (versus 24% overall).

As mentioned above, the participants in the “Investigating” group had very low overall AME ratings. They averaged a 1.7 score as compared to the overall average of 2.9. This is reflected in their score in strategic account success indicators, where they were significantly below the performance of the other performance groups. As might be expected for a group that often didn’t have a strategic account program in place, the “Investigating”

group had particularly low scores in the area of plan execution. They also were low in aligning to their internal strategies and aligning their goals with their clients’ goals.

These last two factors are particularly noteworthy considering that the next group, the “Focused Performers”, focused on these elements and was able to achieve better than expected results.

### Focused Performers

The “Focused Performers” (25% of respondents) was the only group that was able to do better on its strategic account success indicators than its overall AME rating might have predicted. This group was below average in its overall survey score or rating (2.4 versus the 2.9 average overall) and did not exceed average on any element of the AME rating. Yet, these respondents scored themselves close to average on the business success indicators of customer satisfaction, growth, share, expense control, and quota attainment.

These respondents focus on aligning their AME efforts to their internal corporate strategies, aligning goals with their clients’ goals, and delivering value. In these performance elements alone, they are close to average in their AME work. This focus seems to make a difference for them, allowing them to achieve near average self-rated success in their strategic accounts. This is especially reflected in making quota more often than the rest of their company’s representatives.

The “Focused Performers” tend to come from small companies. Like the “Investigating” group, they are also under-represented in the services and consulting industries (only 13% of respon-

## Performance-Based Clusters

dents versus an overall average of 24%). While far more of the “Focused Performers” have a strategic account program than the “Investigating” group, they are still the second lowest group on this measurement (65% have a program).

The “Focused Performers” are not focused on the planning elements of AME. They have particularly low scores in client plan execution, followed by the client strategy planning process and the rigor of their account management methodology. It may be that the smaller size of many of the “Focused Performers” companies limits the negative impact of the lack of focus in these areas.

A possible concern in an analysis like this is whether participants from this particular group might be overrating their success. However, “Focused Performers” frequently rated themselves lower than other participants on value recognition in relation to value delivered. Forty percent (40%) of “Focused Performers” rated their success in getting value recognized as lower than they rated value delivered. All other participants report this situation only 15% of the time. This would indicate the “Focused Performers” are no more likely than the other groups to overrate their success.

### Working at It

The “Working at It” group (40% of respondents) seems to be about average in almost every respect. Their AME performance is slightly above average on every rating element measured. This gives them an average performance rating of 3.2 (as compared to the entire pool’s average of 2.9). Their success indicators are just below this, falling almost exactly average in every case.

With such a well-balanced group, it is no surprise that there is little remarkable about the group’s demographics. However, there are some noteworthy factors. This group has the highest percentage of strategic account programs in place but exhibits only average success, perhaps illustrating the difference between the mere existence of a program versus true excellence in a program. The role of fee-based services at these companies is bi-modal; it is either very important or not offered at all (this was more evenly distributed in other clusters).

The “Working at It” respondents had the same high and low ratings in their AME work as respondents overall. They are high in aligning to their own corporate strategies and value delivery, and low in sales tool infrastructure and the rigor of their account management methodology. It appears that the elements rated poorly by participants may be those that are most difficult for them to control.

### Stars

The respondents who rated highest came from a broad spectrum of industries, company sizes, and other demographic characteristics. This is good news: success is not dependent on being big, or being a “solutions” seller. Success is a “simple matter” of superior, disciplined execution.

It appears that any business that makes the investment of sound best practices, good methodology, and a focus on their strategic account program will have positive impact on their attainment of quota, customer satisfaction, share, and growth. A differentiating factor may be the ability to implement corrective action—the “Stars” did tend to be participants with a

## Performance-Based Clusters

broader span of control over their company's sales organization than other groups.

"Star" respondents (23% of all participants) rated themselves highest in AME elements overall, and also consistently rated themselves as the most successful in having their strategic account results surpass the results of the rest of their company's customers. Perhaps the only disappointment here is that their level of success was not rated as high as their overall AME efforts. This may simply be a reflection of the extra effort or time it takes to achieve leading results.

The "Stars" scored themselves very high on aligning their programs to their companies' strategies and aligning goals with their clients. They also report a high rating on delivering value to customers and having this value recognized by customers.

Although these ratings were high, the "Stars" exceeded the average by the greatest margin in their systematic and long-range view on deployment of client teams and relationship executives. However, as stated earlier, this was part of a strong overall AME effort with all elements scoring well above the lower levels achieved by other performance-based clusters.

Noteworthy demographic characteristics of the "Stars" included a higher percentage of respondents from the services or consulting industries (34% versus an overall average of 24%). Respondents also tended to be higher-level executives than average and controlled a larger percentage of their sales representa-

tives—about 70% versus an average span of control of 40% of a company's reps represented in the rest of the clusters.

## Summary

The level of execution on AME elements is an extremely reliable indicator of how successful strategic accounts will be as compared to the rest of a company's clients. While respondents had every opportunity to indicate that they heavily focused on one part of AME versus another, or that they were getting far more or less out of their efforts than might be expected, this was not the case. There was only one group able to achieve near average results by focusing more heavily on only a couple of AME elements. Additional assessments may reveal more about this phenomenon. Our hypothesis is that inconsistent performance of the AME best practices will not result in anything beyond average success in many situations. Respondents that believed their strategic accounts were far more successful than average overwhelmingly had well-developed and consistently implemented strategic account management execution in place.

## About Critical Path Strategies

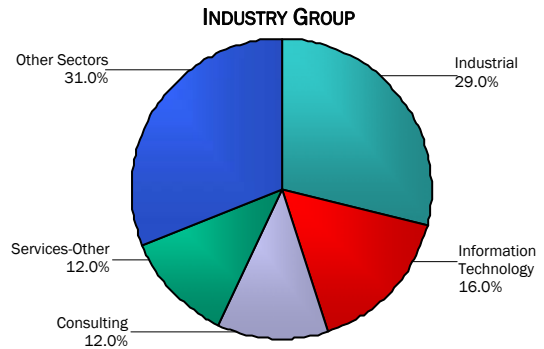
Critical Path Strategies helps clients improve their competitive position by providing comprehensive consulting services to improve the effectiveness of major account sales organizations. Our portfolio of services addresses the strategic, organizational, and relationship issues that impact selling performance. Engineering successful sales teams the Critical Path Way enables clients to develop strong selling organizations, build high-value customer relationships, and accomplish strategic business initiatives. Our clients—emerging companies and members of the Fortune 500 alike—typically measure 100 to 500 times their CPS investment in revenue growth.

## About Filigree Consulting

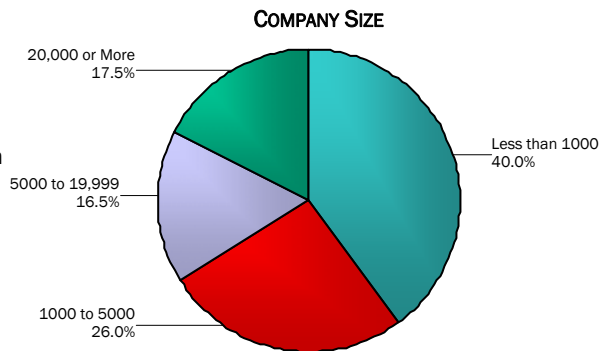
Filigree Consulting administered this study and performed the analysis of the results. Filigree provides custom research, project management, and research consulting for client projects as part of its focus on information-intensive industries. Filigree Consulting works with clients to help them align with key constituencies and build competitive advantage through fact-based decision-making.

## Respondents Demographics

A broad range of industries was represented, with a majority being in the Industrial (29%) and Information Technology (16%) sectors. The remaining respondents were from Consulting (12%), Services-Other (12%), and "Other" sectors (31%).



The largest group (40%) of the respondents came from companies with fewer than 1,000 employees. Of those in larger companies, 26% were in companies with up to 5,000 employees, 17% in companies with up to 20,000, and 18% were in larger companies.



Most respondents (65%) held a middle management or executive management position. The remaining respondents were typically in sales line (16%) or staff (4%) positions, with the remaining 11% indicating responsibilities in "other" areas.

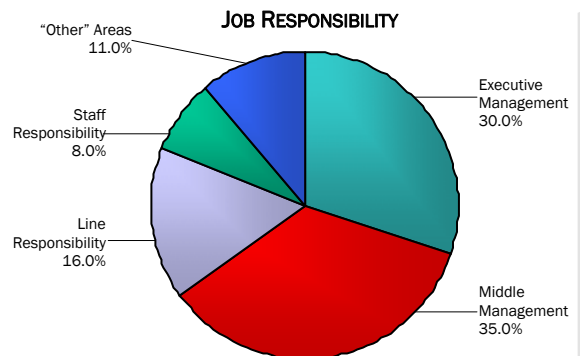


Figure 4. Respondents Demographics

## Definitions

### **Defining the Strategic Account Management Model**

#### Selling Process Definition -

Design of the documented scaleable, repeatable process used to support a company's strategic accounts.

#### Selling Organization -

Design of the resource deployment process for all customer contact functions.

#### People & Incentives -

Design of the compensation plan and incentives for the strategic account management team.

#### Infrastructure -

The systems and operational processes that support the selling organization.

#### Corporate Alignment -

The alignment of a company's corporate values to the approach for supporting strategic customers.

### **Deploying the Strategic Account Management Program**

#### Account Selection -

Definition of the qualification criteria for selection of an account into the strategic account program.

#### Team Resource Deployment -

Design of the process that assigns a company's resources to a strategic account.

#### Account Management Methodology -

Definition of the processes and tool-sets used to develop strategies and plans for strategic accounts.

#### Account Management Discipline -

Definition of the management partici-

pation, review cycle, and coaching approach in support of the customer-facing team.

### **Ensuring Client Alignment**

#### Client Goal Alignment -

The processes used to ensure that the account team's goals are aligned with a strategic client's business goals and initiatives.

#### Client Process Integration -

The process of aligning a company's business processes with those of its strategic accounts.

#### Team and Client Communication -

The defined process and tools used to ensure regular communication within the team and between the team and their strategic clients.

### **Developing and Executing the Plan**

#### Strategy & Plan Development -

The repeatable, defined process used by the account teams to concisely document the strategy and plans to address a client's key initiatives.

#### Plan Execution -

The discipline associated with the account team's execution of their account plans.

### **Demonstrating Value**

#### Value Creation and Recognition -

The process of validating that the client recognizes the value realized as a result of products or solutions delivered by a company.

## *Your Selling Organization Is the “Face” of Your Company. Need a Facelift?*

by Ken Evans



***Before you sign up for a facelift, ask your customers for a second opinion.***

*You are catching your breath after a frenzied year-end close. Considering resolutions for the New Year, you reflect on your achievements and disappointments during the last year—personal, professional, organizational. Finally, you think about your customers. How did you contribute to their success? When answering that question, a healthy dose of truth serum might make for a more successful coming year.*

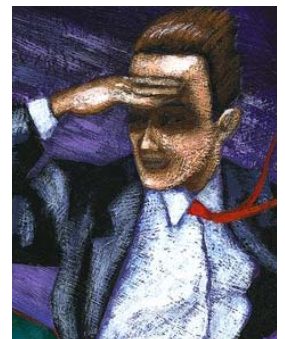
It is natural, of course, to focus first on personal resolutions—more time with family, healthier food, more exercise, save and invest more. Professionally, we might take a different inventory—more time management, more personal development. Organizationally, we might set our sights on more productivity, more profitability, more teamwork. More, More, More.

Finally, our customers. This is often a painful reflection, but it is the litmus test for how a salesperson, team, or organization has performed. It also sets the stage for next year's expectations. Put yourself in your customers' shoes. How did you impact their success?

In the book *Building a Successful Selling Organization*, CPS presents a model for assessing our ability to deliver value to our platinum customers, and the underpinnings necessary for an organization to do so.

Using the Account Management Execution model, we can construct a conversation with a customer executive to solicit an evaluation of our performance. How would our most important customers answer the following questions regarding our execution performance during the past year? Or even more beneficial, how would our customers answer the questions following our performance each quarter?

- How did our organization and the people we aligned with your team work together? In what areas could our teams improve to work smarter together?
- Were we reliable and predictable as we worked towards common goals?
- Were we working on the right opportunities to significantly improve your business? Where should the focus be next year? How can we more effectively communicate as a team?



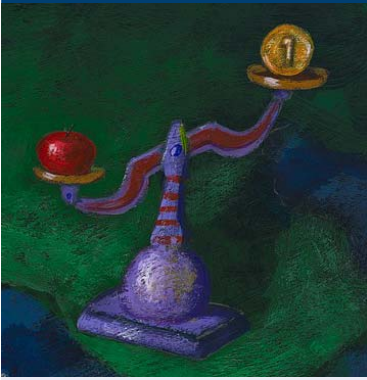


- As we jointly developed our strategies, how effective were we in establishing joint goals? How did our teams do in terms of accountabilities to key milestones towards those goals?
- As you look back at those goals, how close did we get? Did we impact the business to the degree we both aspired to? After both of us invested in these endeavors, what was the return? Should we be celebrating or commiserating?
- If our team and our company could do three things differently to have even more impact in the coming year, what might we do?
  - People?
  - Process?
  - Technology?
  - Strategy?

Too often, we enter a new planning period eager to “change something, change everything” as a prescription for increasing our selling organization performance—without consulting our most important stakeholders! Before you sign up for a face lift, ask your customers for a second opinion.

## The Fourth Quarter: More Than Just Sales Heroics

by Anna Marie Cwieka



*"Great sales leaders create an agenda for their organization that establishes traction in the current selling environment. They focus on several key areas that will allow them to take advantage of opportunities afforded them during the coming year. They make selling into large accounts a definable, repeatable, results-oriented process."*

CPS Founder Art Wilson  
in *Building a Successful  
Selling Organization*

*You've just completed your planning and budgeting process. Chances are, you're looking at a growth target for the coming year that you're not entirely sure how you are going to achieve. And you are frantically trying to make sure your fourth-quarter forecast is on track.*

The fourth quarter is the time to review your strategy, validate and position it with your key customers, engage your team, and take advantage of the unique customer conversations that can take place at year end. This way, everyone can hit the ground running in the new year.

Sound overwhelming to tackle "in your spare time"? Address the "big rocks" that will result in value creation for you and your most important customers. To simplify the process even further, let's take a 30/60/90-day perspective to make the most of your fourth quarter.

**October—Get Grounded.** Who are your most important customers? Where can you deliver the most differentiated value ahead of the defined proposal curve? Where are you profitable? Commodity buyers that contractually limit your margins or customers that soak up overhead to the point of being unprofitable do not warrant the same coverage as strategic partners that will move on sole-sourced, unsolicited proposals. Take a couple of hours to analyze where you need to focus.

Next, get grounded in the big-picture strategy for each of these companies (Gap Analysis). Access to their quarterly and annual analyst presentations now makes information readily accessible and analysis fast. How do the offerings of your entire company align to help them achieve their goals (Customer Value Alignment)? This in turn should open up new opportunities for you to position and pursue (Opportunity Landscape). This entire process shouldn't take more than 45 to 60 minutes per customer. If you have the luxury of a marketing department, they could develop the first pass for you to fine tune.

Take a quick reality check to determine how this analysis fits with your previous account prioritization. Chances are this new, higher-level perspective will shift some customers on your resource allocation curve.

Now you have the foundation for a first round of conversations with your most trusted internal customer contacts. Are you on track? What are their insights? Do they agree with the value linkages? Who would they recommend you (and other members of your team) speak with in their organization (Organization Map)?

**Best Practice**  
Get grounded. Analyze where you need to focus. Use this first-round thinking as the foundation of joint company/customer/supplier planning sessions.



#### Best Practice

Enroll the team. Confirm your value propositions and customer alignment. Some of our customers create large wall charts with this information and post them in common areas along with performance benchmarking information for task force or operations personnel.

#### Best Practice

Extend the relationship between your company's and your customers' executives. One of our clients, working in a very complex customer environment, has proven the value of taking the time to brief his counterparts so that they in turn can "brief up." By the time the respective executives meet, the value seeds have been planted and the meeting can focus on areas of possible strategy execution.

**November—Enroll the Team.** Use this month to enroll your team...from your executive sponsors to your sales team, as well as key program/project managers and the delivery team. Make sure everyone understands the customer's big picture and your alignment. Agree on your overarching value proposition (from Customer Value Alignment) and how it might translate at the project or site level. What can the team add to the Opportunity Landscape based upon this higher-level analysis?

Agree on the overall relationship strategy and customer relationship ownership and messaging. At this point, you can create the outline for individual opportunity strategies. By taking the time for team collaboration, you can create an actionable execution plan with identified ownership, deliverables, and accountability. Brief bi-weekly team calls will keep the plan current and moving forward.

**December—Plant the Seeds by Extending the Relationship.** This can often be a fairly quiet month at the senior-executive level of your customer organizations. Use this time to strengthen or establish relationships with your company's executive counterparts. This can be as simple as setting up a single meeting or as elaborate as multi-track briefings along hierarchical lines within both organizations.

Preparing your executives for these meetings is essential but not particularly difficult. Key points usually include:

- Thank you for your business this year.
- Our team feels that they contributed in the following ways...
- Our team sees your primary objectives as...
- Which of these do you see as the most challenging?
- How can we best help you achieve those goals?

We so often fail to take full advantage of the speed with which executives can jump over organizational and contractual hurdles. Arming them with customer context and key messages can make all the difference between a social call and a trusted partnership.

High-level strategy, actionable team enrollment, trusted valued relationships—these are the best next actions that will help you make the most of your fourth quarter!

In *Building a Successful Selling Organization*, CPS founder Art Wilson analyzes the complex processes required for strategic customer relationships. He demystifies them into sustainable, business-to-business relationships that will yield extraordinary results. Moving forward with consistent targeted actions, like those described in this article, results in a tight cycle of value with key customers that bring continued and ever-greater rewards for all parties. Please visit [www.criticalpathstrategies.com](http://www.criticalpathstrategies.com).