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IS/IT Account Manager Information

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SUMMARY

This is a collection of information on the Account Management function.

This includes general background information and descriptions of the role and expected benefits, plus 2 examples of Account Manager Job Descriptions.

This is for initial reference and background information only

DECLARATION

We believe the information in this document to be accurate, relevant and truthful based on our experience and the information provided to us to date. All information is provided in good faith, in confidence and in the best interests of our clients. Please contact [Barclay Rae](#) to discuss any questions or further requirements.

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1 BACKGROUND

Account Management is a business discipline. In the commercial world it involves customer interaction, marketing, product and service development, project management, quality assurance and sales technique. Within an existing IS organisation the same skills are required, although the difficulty is how to change the culture and mind-set across the organisation to accommodate this.

The following are required to achieve effective Account Management:

- Visible and ongoing senior management commitment
- Co-operation and positive support from staff
- Careful selection of suitable people as Account Manager
- Appropriate training and development for Account Managers
- Future (potential) structural changes to the organisation
- Implementation of SLAs, Problem and Change Management
- Appropriate tools and reporting to support the above processes

Relationship with IS

Account Managers should represent all IS services to their customers. It is therefore their responsibility to keep up to date with all projects, new technologies where possible, and all potential services available from IS. An Account Management team will share information and also have regular forums within IS, as well as building suitable relationships with customers.

Account Managers must also be able to pull together resources within IS, for quotations of work, and for small 'mini' projects. They must also provide quality assurance and support themselves on major projects.

Reporting lines

The Account management team should appear to customers as a non-aligned group – i.e. with no service or project responsibility. This adds to their credibility and helps them to maintain a level of independence when resolving or investigating issues.

Account Managers should also 'report' to their relevant customer managers – a clearly defined report/point of contact should be agreed with each department. This provides an opportunity to review performance and identify new requirements. It is also an excellent way to understand customer needs and issues, as good Account Managers get invited to departmental meetings etc.

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What is Account Management?

Account Management within commercial organisations combines a sales responsibility with a review and escalation function. The account manager is tasked with ensuring that clients are happy with the service provided, whilst identifying new opportunities for business.

This is similar within internal IS organisations, where the Account Manager 'owns the relationship' with his/her customers. Usually the AM will not actually deliver projects or services themselves, but will act as the facilitator and co-ordinator between the customer and the IS organisation, providing quotations and overseeing projects etc.

Account Management helps to improve IS efficiency, as communication channels (internal and external) become simple and less time-consuming. This allows technical staff and groups to focus more on their projects rather than dealing with overlapping enquiries, attending numerous meetings etc.

Most importantly Account Management ensures that IS organisations provide a single point of enquiry, contact, escalation and ownership. This saves customers the inconvenience and confusion of having to contact and co-ordinate several IS support groups themselves.

Like a commercial Account Manager the IS equivalent also collects information about customer's needs and feeds this back within the IS organisation – often this results in change, restructure and refocus on products, services and systems. This is a vital part of the process to ensure that IS meets customer expectations.

Effective Account management is highly appreciated by customers, as it avoids the frustrations associated with dealing with technical groups and issues that are basically irrelevant to them. Instead they have a single contact that owns and resolves their questions, issues, requests etc – a positive and service-based business relationship.

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Benefits from Account Management

- Improved communications flow between IS and customers
- Improved internal communications within IS organisation
- Improved use and efficiency of resources within IS
- Single point of contact for customers – single point of facilitation and co-ordination within IS
- Reduced risk of losing business from departments
- Consolidation of business relationships – and recovery of lost business if applicable
- Opportunity to identify and deliver new services to customers
- Improved alignment of services delivered to meet customer needs
- Improved and consistent level of reporting and analysis of services delivered
- Opportunity to develop bespoke services into service products across departments
- Opportunity to sell some services externally?

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Recruitment of Account Managers

Careful selection is vital – the future of IS rests with the Account Managers and it is essential to place the most suitable and capable people in the role.

Personality profiling should be derived from psychometric testing – if this is not possible the characteristics required should be identified from personal discussion and agreement by an interview panel.

The key elements required for Account Managers are as follows:

- People focus – personality driven by success in relationships and solving people's problems
- Dynamic self starter who doesn't require (or really like) to be told what to do – likes to be busy and active
- Technical through training – focus should not be on technical interest first, although the person should be capable of understanding technical issues
- Extrovert and outgoing – enjoy the company of people and constantly making new contacts/relationships. Enjoys being at the centre of the action
- Completer/finisher – quality and attention to detail are key drivers
- Enjoys and is motivated by some stress – likes winning against the odds
- Needs success and peer respect – earns and enjoys it
- Focus on achieving goals and will stop at nothing to ensure these are met – generally tactful but keeps focus on achieving goals
- Short to medium term interest span for projects
- Enjoys multi-tasking and being in control of numerous issues at once.
- Will delegate once they trust those to be delegated to

CONFIDENTIAL**JOB DESCRIPTION (EXAMPLE #1)**

Job Title	IS Account Manager
Dept./Service/Section	
Line Manager	
Purpose of the Job	<ul style="list-style-type: none"> ▪ Responsible for direct interface with customers giving high-level advice and support. Ensuring that the customers overall requirements of IS are managed.
Principal Accountabilities	<ul style="list-style-type: none"> ▪ Providing general advice, assistance, escalation and consultancy. Maintains a high level of awareness of market developments and in particular within the business area specific to the customer ▪ Liaison and co-ordination between customers and IS delivery and development groups. ▪ Contributes to the development and planning of the IS strategy in collaboration with the customer and IS management by articulating the customer's business requirements and possible impact to IS ▪ Assists the customer in the development of the IS-related annual budget estimates and manages/monitors expenditure against it. Pro-actively participates in the customer's thinking and planning processes ▪ Provides regular input to IS and line management on customer requirements in order to achieve an efficient allocation and prioritisation of IS resources. ▪ Development, negotiation and ongoing management of Service Level Agreements.
Skills/attributes required	<ul style="list-style-type: none"> ▪ Broad knowledge of organisation, applications and IS Customers ▪ Customer focus, attention to detail, outgoing, people person, communications skills, assiduous, likes challenge, multi-tasking, stress ▪ Motivated by relationships, problem solving ▪ Understanding of Account Management process ▪ Any relevant Sales Skills or experience useful

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JOB DESCRIPTION (EXAMPLE #2)

Description of Post

- To act as the prime single point of contact within the IS Division for a group of Departments and to take ownership of all problems and issues raised by them.
- To ensure that the requirements of the customers in the above Departments for IS services are effectively co-ordinated and delivered to the customers' satisfaction.
- To sell the services of the IS Division and assist in their marketing and to negotiate and manage Service Level Agreements (SLAs).

Account Management Duties

1. Actively maintain contact with customer representatives regarding current and future services with the goal of maintaining and generating new business.
2. Co-ordinate the handling of new requests from customers, from all sources relating to services supplied by the IS Division.
3. Offer advice and assistance on all matters relating to services provided by the IS Division, in conjunction with the recognised technical experts. This should include the relaying of decisions made at user group and internal IS strategy meetings and making sure that they are understood.
4. Liaise with and co-ordinate actions between customers and the IS Division. Offer regular input and feedback on IS service issues, as they arise, to departments.
5. Promote new and existing IS services to customers.
6. Identify areas for service enhancement for customers and their departments and the company as a whole and to provide feedback to all IS staff on such areas.
7. Development, negotiation and ongoing management of SLAs.
8. Advise customers in their development of IS-related annual budget estimates where requested.

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9. Promote all corporate technical and procedural IS standards and guidelines and advise on their use. Monitor their adherence and feed back any issues arising to IS Management.

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Relationship within IS Division

10. Contribute to the IS work planning process by articulating the customers business requirements.
11. Contribute to the continuing development of the IS service strategy.
12. Provide regular input and feedback on customers' issues as they arise to IS Team Leaders.
13. Escalate customer problems, as appropriate, be they technical, administrative or managerial. This should be done in accordance with agreed problem management procedures.
14. On a day to day basis, liase with and co-ordinate multi-team actions between different IS Team Leaders, and assist communication between them.

General

15. Maintain a knowledge of current standard IS services and the methods of provision of these.
16. Maintain adequate and up to date technical awareness and also maintain awareness of current IS issues, trends and major projects.
17. Aim to attain appropriate accreditation in Service Management.
18. Liase with the Audit group on all relevant issues.
19. Undertake other duties appropriate to the level of the post as directed by IS Management from time to time. This may include acting as project leader for projects that span a number of teams in the Division.

END OF DOCUMENT