How to build account team collaboration: a powerful competitive advantage

By Elizabeth Strong

Have you ever been on a conference call with your sales team, doing a roundtable of quick updates on account activity? The first person talks for 10 minutes, so everyone feels they need to do the same or else look like a laggard? That competitive spirit shines through every time. It's how we're wired and what makes us successful in sales. But for a moment imagine if you could get that team to truly collaborate—to gather each individual's knowledge and insights and apply that to pursuing opportunities or solving problems. Consider the wealth of information you would have. That knowledge is intellectual capital, and it can give you a huge edge over the competition.

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It sounds easy, but it's not. Why? Because by design every account team member is focused on his or her area of responsibility and compensated for delivering results in that area, be it a geography, product set or particular division of the customer account. To build true team collaboration, you have to go beyond traditional forecast and pipeline discussions. You need to engage the team in dialogue about account problems or opportunities and get the team working together on developing strategies to address these issues. What's the benefit? The benefit rests in the multiplier effect. By applying the team's collective knowledge and experience to opportunity development or problem solving, you get better results and everyone learns in the process. People take those teachings back to their day-to-day work, and over time everyone is more effective and productive.

I have used this approach with several global account teams. Although the team members around the world communicated regularly through voice mail and e-mail, they found that collaboration sessions resulted in valuable discoveries and breakthrough thinking. Each member brought in-depth knowledge of some aspect of the customer's business as well as important insights into the key players, background on the customer's internal political landscape, the member's experiences with our competition, what the customer valued (which may differ country by country or division by division) and so on. Through collaboration the team identified millions of dollars of opportunities. The really good news is that we were able to win many of them.

The following five-step process for building collaboration is effective with local, national or global teams. Note that a collaboration session can be a conference call or face to face.

1. Identify one opportunity or problem as the sole topic for the collaboration. Do not try to cover multiple topics in a session. The discussion needs tight focus on the challenge at hand. However, be open to exploring seemingly unrelated information or perspectives. Sometimes numerous team members must deal with a customer situation from different angles and don't realize that it is the same one until they openly examine it. Each person might have a different part of the story, and only through combined knowledge can you develop a winning strategy.

2. Select the team members who will participate. You may want to include the entire team; you never know when someone supposedly uninvolved has relevant information or insights. If the team is large, you may prefer a subset of it. Use the obvious stakeholders as well as other members who will bring in fresh perspectives. For example, include account members from multiple geographies or other people inside your company from marketing, finance, services, engineering or manufacturing.

3. Set the stage. Sales teams typically do a lot of reporting out. As the session leader, it is important that you set the stage for the collaborative dialogue. Be clear this is not a "report out" session. Explain the objective and establish the guidelines.

4. Frame the topic. Ask the team member who has primary responsibility for the topic to give an overview and clearly state the roadblocks or challenges. Then actively engage everyone in an open discussion. Encourage dialogue about the situation from the customer's point of view, the customer's political landscape, how this situation may relate to another that someone on the team has encountered, alternative approaches, etc.

5. Close by summarizing key points and action items and identifying next steps. Since much of the discussion will focus on gathering information, brainstorming and connecting the dots, it is very important to summarize the key points, breakthrough ideas and any action items, including owners and deadlines. This not only highlights what you have accomplished but also establishes accountability.

Be sure to stick to the time frame you scheduled. Everyone has a tight schedule, and you do not want to lose people in the thick of the dialogue. It may be necessary to reconvene on a regular basis to follow up until the opportunity or problem has concluded, but often the owners can take it forward from there. Either way it is important to communicate progress and outcomes to everyone who participated. Salespeople constantly juggle time spent with the customer versus time in internal meetings. Salespeople are (as they should be) sensitive to any requests for their time and need to see the value and benefit of participating in a collaboration session.

You may want to start by conducting one collaboration session so you can become comfortable with the process. Use that experience as a showcase for other sessions. Widely communicate the process and results. After you have effectively launched your first collaborative team, you can launch others to tackle other topics. Over time the entire account team will be accustomed to working together in ways it never considered before. Collaboration creates an engine for continuously developing valuable team relationships. Think about what happens when account team members are co-located. They randomly have hallway discussions, coffee, lunch or drinks after work. They share stories and build trust. They figure out each other's strengths and watch each other's backs. How do you create this with a geographically dispersed team? Time zone and cultural barriers often get in the way, causing relationships to haphazardly develop, which may not give you the leverage you need.

Collaboration provides any team, local or global, with a platform for working together and building credibility and trust. By bringing team members together on critical account-based topics and leading them through constructive dialogue, you provide a forum for sharing knowledge and experience. You open the lines of communication and collaboration. You build bridges across borders, whether they are geographic, cultural or intellectual. Through consistent team collaboration, you will harness the intellectual capital of your team, which is a clear and powerful competitive advantage. And don't think your customers won't notice. They may even surprise you by asking how you have achieved increased levels of collaboration and cohesiveness with your team when they experience difficulties with theirs!

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