

# EVOLVING TO MEET THE CHALLENGE IN AN EVER-CHANGING SAM ENVIRONMENT

SAMA 2023 Annual Conference  
May 23-25, 2023

Hotel del Coronado, *Curio Collection by Hilton* • San Diego, CA

<https://bit.ly/SAMA2023ConfReg>



In 2022, attendees rated SAMA's  
Annual Conference speakers and content  
4.5 out of 5 stars.



# Why Attend the 2023 SAMA Annual Conference?

## A Trusted Source

For almost 60 years, SAMA has been the undisputed knowledge leader on managing large, complex customers. Because we are nonprofit, we can afford to be both noncommercial and unbiased in our unrelenting focus on the challenges of strategic customer management. We make it our business to identify new issues and leading-edge ideas and translate that into food for thought for our customers.

## Know-How Based on Know-Who

It has been said that "it's more important WHO you know than WHAT you know." In SAMA's case, our "know-who" leads to your "know-how." The SAMA Knowledge Network is a community of practitioner and subject experts that is unparalleled. Engaging with SAMA provides you an instant personal network. Many attendees create lasting relationships that last for decades, that are truly valued personally and professionally. We believe in the power of connection and community and after so many months being virtual, we look forward to seeing you in person.

## One Great Idea

The business of managing strategic customers is a fast-paced, high-stakes environment. SAMA's community is a busy one, and we recognize that it's difficult to find the time to step back and take advantage of an opportunity to learn, brainstorm, and validate. But consider the power of just one great idea that can deliver true value to you, your company, and your most important customers. The ROI is undeniable.

## Fast Paced, Practical Learning

SAMA's learning environment provides an exhilarating educational experience that is anything but boring. Our conference offers breadth, depth, and a sharp focus on real-world challenges that cross all industries. Sessions are led by practitioners and subject experts who have proven experience and a true desire to share ideas. SAMA's culture of open exchange gives participants more than just an education – it provides a think tank of peers.

## Competitive Advantage

With hundreds of companies from an array of industries in attendance, can you afford to stay home if even one competitor is gaining exposure to best practices? Chances are, your customers will be there too, providing opportunities for meeting counterparts who can offer a unique perspective, new information, or even assistance in gaining access to key stakeholders in their firm. Companies that want the competitive advantage come to the SAMA conference.

## Monday, May 22

4:00pm-6:00pm Bonus Session  
6:00pm-7:30pm SAMA Happy Hour

## Tuesday, May 23

7:00am-8:00am Breakfast  
8:00am-5:00pm Keynote and Breakout Sessions  
5:00pm-6:30pm Reception

## Wednesday, May 24

7:00am-8:00am Breakfast  
8:00am-5:30pm Keynote and Breakout Sessions  
6:00pm-7:00pm Transportation to USS Midway Museum  
6:30pm-9:30pm Reception and Dinner at the USS Midway Museum  
9:00pm-10:00pm Transportation to Hotel del Coronado

## Thursday, May 25

7:00am-8:00am Breakfast  
8:00am-1:00pm Keynote and Breakout Sessions  
1:00pm Conference Adjourns

## Keynote speakers:



### Combat Leadership: Build High Performance, Winning Teams

Dave Berke

*Chief Officer of Development and Curriculum*

Echelon Front



### The Experience Mindset

Tiffani Bova

*Global Customer Growth and Innovation Evangelist*

Salesforce

# AGENDA

## at a glance

(Conference agenda is subject to change)

“Some of the sessions really blew me off my feet – interesting and disruptive ideas you can only find here.”

– Pierre Tabary, SAM Program VP (ret.), Schneider Electric

<https://bit.ly/SAMA2023ConfReg>



# 40+

## trailblazing sessions

For session updates, visit: <https://bit.ly/SAMA2023Conference>

Conference Track:

### Critical Skills for Strategic Account Managers

An enabled, empowered SAM with the right combination of leadership traits and business acumen is an unbeatable combination. Learn what's in the DNA of an elite account team leader and how the best SAMs and GAMs orchestrate the strategic value creation process and drive business outcomes for their customers. Sessions will cover managing teams with diverse cultural backgrounds, understanding and outwitting Procurement, using data to bring new value streams to your customer, how to win bigger (and better) deals through upstream certification and specification, and much, much more.

#### Session 101: A Crash Course in Negotiations: The Power of Nice

Presenter: Jeff Cochran, Partner and Master Facilitator, Shapiro Negotiations Institute

People are under increasing pressure to quickly establish credibility, build lasting business relationships, and produce results. To address these challenges, they need specific habits and tools to impact the bottom line. Finding these tools and actually implementing them in the face of fierce competition is not easy. In this presentation, participants will be introduced to a systematic process that will allow them to become more effective, efficient, and creative in their negotiation.

#### Session 102: Strategic Account Management in a Post-Sale Capital Equipment Ecosystem

Presenters: Robert Willard, Director of Service, Global Key Accounts and Support Solutions, Coherent Inc.; Chris Miller, Sr. Manager, Global Service Markets & Accounts, Coherent Inc.

Becoming a trusted advisor within your customer's decision-making process requires time and repeated touchpoints within the post-sale product lifecycle. Critical to demonstrating value and creating a true bond is consistent use of data to manage positive and negative deviations in real time while reporting on and managing lagging KPIs over multiple years. Post-sale capital

equipment management means applying SAMA practices to a larger set of players, roles (manufacturing, service, logistics, and quality), locations, cultures, and personalities.

In addition, we'll cover:

- Why the post-sale ecosystem is different.
- Managing a global distribution with varied, but equal stakeholders.
- Navigating a new set of success factors, expanding customer insights, and demonstrating value.
- Maintaining a solution-provider status over a decades-long product lifecycle.

#### Session 103: Dealing with Procurement: How you can turn purchasing adversaries into devoted allies

Presenters: Alessio Arcando, Director of Key Account Management, Bologna Business School; Ceynur Nak, Founder of Leappo; John Shulman, Co-founder and President, Alignor

Join us for a deep dive into the world of procurement! Learn what makes buyers tick, how they are measured,

<https://bit.ly/SAMA2023ConfReg>

the negotiation tactics they are trained to use, how they seek to show differentiated value to their internal "customers," and most important, how you can use these insights to your advantage. In this interactive, hands-on workshop, you will apply a proven framework and tools that help you convert skeptical buyers into eager allies who "sell" you and your offering to their internal business partners. During the workshop, you will participate in realistic online simulations that allow you to "role play" typical interactions with procurement. This interactive and practical workshop is led by negotiation experts with decades of experience working closely with strategic procurement organizations. You will be able to apply the methodologies and tools from the workshop right away. Learn how to improve key relationships and unlock value at accounts where procurement has, until now, stood in your way!

Workshop overview:

- How you can help procurement get credit for value delivered
- What relationships are important to procurement
- Overcoming objections and handling procurement's negotiation tactics
- Converting procurement into your internal upselling partner

---

## Session 104: How to Drive Results and Make an Impact: A toolkit for strategic account managers

Presenters: Tom Kurt, Strategic Account Manager, Sonoco; Aaron Erbe, Director - Segment Sales, Sonoco

Sonoco, the global leader in paper tube sales and manufacturing relies on a proven tool set to protect their most important strategic accounts, grow their business,

and manage profitability. In this session, SAMs will learn concepts they can utilize with challenging strategic accounts. During the session, Sonoco describes the strategic situation and how to apply battle-tested SAM tools. Attendees will gain insight and a dependable framework to deploy with strategic accounts. Sonoco, a long-time SAMA corporate member utilizes selected strategic tools to consistently win in their markets and develop their SAMs.

Key topics for this session are:

- Broader & Deeper Strategic Approach
- The Large Deal Team
- Create, Quantify, and Communicate Value
- SAM Focus and Mental Toughness
- Price Optimization

---

## Session 105: Speaking the Language of Procurement

Presenter: Carrie Welles, Partner, Think! Inc.

We have all been here. You have flawlessly executed your value-based sales process, the deal is nearing close, and you learn the deal is now being turned over to procurement. We also know the conversation procurement wants to have is about price. In this session we will leverage our deep understanding of how procurement functions and more importantly, how to change the conversation from price back to value.

The session will focus on two areas:

1. Learn what's really important to procurement so we can speak their language.
2. Leverage that knowledge to take back control of the negotiation.

We've spent years consulting to sales organizations

globally. What is more important, however, is our work behind the scenes consulting with buyers. We will provide insight from that practice along with what we learned writing a negotiation book for buyers in concert with a supply chain management expert.

---

## Session 106: Value Realization: The Next Competitive Advantage

Presenter: Stephan Liozu, Founder, Value Innorruption Advisors LLC

Following COVID and the ongoing economic slowdown, customers are demanding tangible proof that their suppliers are delivering the economic value they were promised at the time of contract signature. Did suppliers keep their promises and are they able to show documented value overtime? These are critical questions in times of budget tightening and expense prioritization. As a result, SAM, GAM, and KAM have to add value realization to their toolbox. It is no longer enough to create, quantify, and capture customer value. It is equally important to deliver and realize value for customers. This new dimension of customer value management has become front and center in the Software-as-a-service (SaaS) world through the emergence of the customer success function. But the account management profession plays a critical role as well. In this session, we review key customer value concepts, introduce value realization, and discuss how technology can help automate value realization programs.

Attendees will learn:

- What value realization is.
- How to design value-realization programs for SAM/ GAM/KAM.
- How value realization can boost sales velocity and customer retention.

## Session 107: Gaining and Leveraging Customer Momentum from Your Portfolio of Account Value

Presenter: Steve Andersen, President and Founder, PMI;  
David Adams, Partner, PMI

In this 75-minute session, participants will select a strategic/key account and “try on” proven best practices for developing and sustaining momentum with their most important customers. Facilitator Steve Andersen of PMI will provide participants with a proven approach for defining and building an Account Value Portfolio, unpacking critical components, and explaining how top performing account managers gain competitive advantage and drive proactive growth by leveraging their value co-creation in the past, present, and future.

The session will begin with a self-assessment to help participants determine the current state of their Account Value Portfolio, providing a baseline with which to capture past proven value, strategize current sales opportunities, and identify areas of future potential account growth. The focus will then shift to building an effective Account Value Portfolio, as participants will explore how to leverage their past, present, and future value co-creation to gain momentum for proactive account growth.

The session will be supported by the application of best practices and tools to:

- Assess the current state of your account value portfolio.
- Capture your past proven value co-creation and align with customer success.
- Define the business outcomes the customer experienced as a result.
- Evolve key customer stakeholders into sponsors and supporters to gain momentum for growth.
- Explore sources of momentum for competitive advantage

in current sales opportunities.

- Discover and explore future potential value targets for account expansion.
- Develop your account value portfolio and validate with your account team (and customer).

Specific areas of emphasis of this “How to?” session will include the primary dynamics for building and articulating your past proven value, connecting your past proven value with customer business outcomes to gain momentum in current opportunities, aligning your portfolio of account value with what's most important to the customer's key stakeholders, and the critical success factors for developing and executing an effective account growth strategy. The session will close with participants identifying follow-up focus areas to strengthen their Account Value Portfolio and gain momentum for growth and expansion.

---

## Session 108: Telling Your Account Story Through Effective Executive Briefings

Presenter: Todd Lenhart, Managing Partner, PMI; Dino Bertani, Vice President, Head of Alliance Management, Zealand Pharmaceuticals; Robert Eastwood, National Account Manager, Boehringer-Ingelheim

In this session, participants will select a strategic/key account and “try on” a proven approach for taking their account briefings and reviews to the next level of effectiveness. Facilitator Todd Lenhart of PMI will unpack the Executive Account Briefing process and provide participants with a format and structure for conducting powerful account briefings and reviews that have been designed and deployed within SAMA's certification program and implemented within the SAMA community.

The session will begin with a self-assessment to help participants determine the impact of their most recent account briefing/review, providing a baseline with which to assess strengths and identify potential gaps. The focus will then shift to defining the structure of an effective account briefing as participants explore how to refine, enhance, and tell their “account stories” most effectively.

The session will be supported by the application of best practices and tools to:

- Assess the strength of your account review/briefing.
- Define the critical elements of an effective executive account briefing (past/present/future).
- Leverage past proven value to focus your briefing on customer success (the past).
- Summarize your active sales opportunities and alignment with key stakeholders (the present).
- Develop strategies for account growth/expansion and action plans for execution (the future).
- Explore potential obstacles and risk factors that could impact your plans.
- Articulate and activate “main thing” focus areas to gain support for your plan after the briefing.

Specific areas of emphasis of this “How to?” session will include the primary dynamics of telling an effective “account story,” leveraging cross-functional account team resources in the Executive Account Briefing process and sharing common success factors identified and observed in effective and successful account briefings and reviews. The session will close with participants identifying follow-up focus areas that will help them strengthen the impact of upcoming Executive Account Briefings.



## Session 109: Opportunity Management for a Modern Strategic Account Manager

Presenter: Marcus Redemann, Management Partner, Mercuri International

Managing opportunities and driving them to an order is one of the key tasks for strategic account managers. Equally, opportunity management is creating multiple moments of truth and impacting the customer's experience and therefore the probability to win.

In today's world it is not a walk in a park because the decision-making process of customers is getting more complex and following just one approach to win an opportunity is not enough anymore.

A modern account manager needs to be agile and be prepared for a differentiated opportunity-management strategy to unleash the power of his solution while gaining the applause from the customer. During this session, you will learn to map your opportunity and understand the different buying situations, as well as gain the capability to cope with these to break away from competition.

---

## Session 110: Winning Internal Support for Your Accounts

Presenter: Dave Cusdin, Global Account Director, Mercuri International

Speaking with strategic account managers (SAMs), winning internal support is one of their biggest challenges in achieving their strategic account goals. During this session, we will explore two key aspects:

- What are best practices for SAMs to make this process more successful?

- What does the organization need to do to enable and support the SAMs?

By the end of the session, you will be able to assess your current situation against best practices we have observed working with some of the world's largest companies and their SAMs. Our aim is to give you new ideas as to how you can improve internal support for your SAMs and ultimately your strategic accounts.

Tools and templates will be provided, and participant exercises will be integrated into the flow of this workshop.

---

## Session 111: Structured Storytelling

Presenters: Adrian Davis, Principal Partner, The Summit Group; Janti Masani, Founder and CEO of CXO IMPACT, Principal, The Summit Group

Today's business executives face enormous challenges. Many are overwhelmed as they try to navigate macroeconomic challenges such as inflation, supply chain disruptions, a shrinking labor pool, and geopolitical hostilities. This chaos and uncertainty create unprecedented opportunities for SAMs to show up differently and tell different value stories. The key to creating greater relevance begins with story listening, continues with storytelling, and concludes with story making. SAMs and SAM teams will leave this session with a robust understanding of the power of story and how to apply it to create compelling value in any client situation.

We will uncover two examples from different industries — medical devices and manufacturing — of how to structure conversations with storytelling around global meta themes and make them relevant to the client. Learn how to engage the C-suite on topics that matter most, and tell a story using simple techniques to bring the client back to a common area of interest and mutual collaboration.

Conversations that win mindshare ultimately win wallet share. Winning mindshare is about the story and will be the distinguisher.

---

## Session 112: Strategic Account Management & Sales: How to synergize the sometimes contradictory

Presenters: Myla Maloney, Chief Commercial Officer, Premier Inc., PINC AI Applied Science; Britney Horrocks, Director Strategic Accounts, Premier Inc., PINC AI Applied Science

In this interactive and lively discussion, you will learn how to ensure your overall relationship is aligned to strategic and business goals for both your client and your organizations. There will be a focus on discovery of skills needed to balance the singles, doubles, and home runs to ensure realization of long-term strategy and short-term business needs. This session will focus on how to leverage value co-creation to achieve strong business outcomes. Myla and Britney will showcase specific case studies in becoming a valued, trusted partner while wearing both the SAM and sales hats.

---

## Session 113: Protect Revenue, Protect Relationships: Become a 14%er

Presenters: Ed Wallace, Managing Director of Human Capital, AchieveNEXT; Mark Allen Roberts, CEO & Founder, OTB Sales Solutions, Executive Sales Coach

Did you know that even during times of economic uncertainty, 14% of companies actually grow an average of 9%?

Join bestselling author Ed Wallace and sales effectiveness expert Mark Roberts on how to become a 14%er and grow your accounts regardless of economic conditions.

We'll share ways that the 14%ers:

- Continue to outperform their competitors regardless of economic uncertainty.
- Transform relationships from vendors to valuable industry resources.
- Understand the real impact of your offerings on the customers business outcomes.
- Conduct discussions in the language of the decision maker.
- Realize your true sales superpower.

Want to become a 14%er? Join Ed and Mark as they share how SAMs grow an unfair share of the key account's wallet while other account managers are struggling just to get conversations.

---

### Session 114: Selling complex solutions to global buyers: a neuroscience approach

Presenter: Dr. Carmen Simon, Chief Science Officer, Corporate Visions

It's been suggested that different cultures appreciate different levels of detail during business presentations. For example, some cultures strongly believe that details are necessary to understand content deeply and avoid misunderstandings. Other cultures prefer to communicate by "suggestion," meaning they generalize the information and draw personal conclusions, rather than being given all the details.

However, many of these observations on cultural preferences for detail have been based only on surveys

or anecdotes — not rigorous empirical study. Do these opinions hold scientific weight? In this session, Dr. Carmen Simon, Chief Science Officer at Corporate Visions, shares her latest neuroscience research on handling complex content during a sales pitch, while dealing with culturally diverse brains. Join us to learn practical guidelines for addressing intricate content for international audiences, and find out clear answers to these questions:

- Should you simplify complex information for a culturally diverse audience?
- Do buyers from different cultures process information differently?
- How can you manage complexity to make your sales presentations more memorable?

---

### Session 115: Engaging the C-Suite: Be so good that you get invited back

Presenter: Dan Kosch, Co-CEO of IMPAX Corporation

As SAMs, our roles are important, and to do our jobs, we need to interact effectively with people at all levels in our customer's organization. However, getting to the senior executive level, where the business impact of our solutions can truly be appreciated, remains challenging. We know that to sell the value of our solutions, we have to get to people who can understand that value, but that doesn't make it easy. When we do get to these executives, we have to be so good that we get invited back.

In this session, you will learn how to:

- Efficiently understand your customer's business environment and leverage that understanding to gain access to senior-level executives.
- Speak their language and position your solutions in terms of the critical business outcomes they care about.

- Deliver your message in such a customer-focused way that you are perceived as a credible business resource and not a vendor.

---

### Session 116: Account Feedback Metrics to Guide Transformation: From transactional supplier to strategic account-centric trusted advisor

Presenter: Dennis Chapman, Founder/CEO, The Chapman Group

In a business world characterized by fierce global competition and account demands, an organization **needs strong and well-founded signals (metrics)** that indicate when key objectives are being met or when trouble is on the horizon. Traditionally, strategic account management programs are evaluated by the sales numbers they post. While sales numbers, usually defined as revenue and profitability, are critical measurements, there are additional key metrics to consider that provide additional valuable insights to the status of the relationship. These metrics provide insights into the probability of achieving, or not achieving mutually beneficial goals, and ensuring the right account management construct; ultimately guiding the transformation to a highly productive / collaborative customer-centric organization.

Key learnings of this session include:

- What is an Account feedback dashboard?
- Choices of metrics: Which metric will best provide the optimum value?
- How to develop, communicate, gather, and measure any metric?
- Launching metrics: What, how, by whom and when?
- Challenges associated with any account feedback program.



## Session 117: Getting Credit for Value with Customers

Presenter: Mark Shonka, Co-CEO, IMPAX Corporation

Strategic account managers are in a tough position right now. With a recession looming, the pressure to renew and expand customer relationships has never been higher — and yet customer loyalty is at an all-time low. The power of procurement is growing, and many SAMs are facing stiff, margin-erosion pressure when negotiating renewals. At the same time, SAMs and their organizations are helping to create rich value for their customers. The unfortunate truth is that this value only matters if you get credit for it. This fast-paced, interactive session is designed to help you understand the value you create and then communicate that value in the right way to the right people.

---

## Session 118: Making Customer-Centricity Matter

Presenter: Jonathan Hughes, Partner, Vantage Partners

With the risk of recession looming, customer centricity is an essential way to stand out from the competition and weather market turbulence in true partnership with key customers. Unfortunately, there is a great deal of confusion about what customer centricity is and how to put its principles into practice. At too many companies, customer centricity is mostly hype that involves no substantial change and delivers little measurable benefit.

This session will review recent benchmarking research and case studies to explore how leading companies have transformed every aspect of their operations — from research and product development, to after-sales customer service and support — in order to put customers at the front and center of everything they do, and thereby

gain a durable source of competitive advantage.

Topics will include:

- Research on benefits of customer centricity, including greater revenue growth and enhanced pricing power and profitability
  - Why and how SAMs should lead customer-centricity efforts
  - Customer centricity best practices
  - Customer-centric innovation
  - How to use customer centricity to build and sustain competitive advantage
- 

## Session 119: Not Just Another Vendor: How sales leaders use account planning to build trust and grown revenue

Presenters: Travis Hill, Managing Director Strategic Consultant, Upland Altify; Oliver Yates, CSO, Upland Software, Nicole Denil, VP of Customer Alliances JCI, John Polidori, Head Global Account Management, Conduent

Account Planning is the key to building trust with customers, generating pipeline, and growing revenue. During this session, you will get a real visual of “what good selling looks like” through inspirational stories of real organizations that have been highly successful with Account Planning. The sales leaders behind this success will join us on stage to discuss how they’ve implemented a holistic approach to Account Planning, integrating it into their sales process as a continuous practice that drives huge success. Through these success stories, you will see that it’s not just about short-term goals and winning the deal right in front of you. It’s about winning the relationship and the greater opportunities the relationship affords.

Get inspired to drive new pipeline and grow and retain

revenue in your key accounts. Our philosophy is simple: if you want to win, you can’t be perceived as just another vendor. A successful sales organization is one that makes customers’ success the #1 priority. Go from “what products/services can I sell to them?” to working collaboratively with customers to understand their goals and how you can help them succeed. Account planning enables you to build relationships with key players, get insight into their needs, build roadmaps for their success, and become a trusted advisor in delivering mutual value. And that’s exactly what we want to deliver with this insightful session that will make you “Not Just Another Vendor.”

---

## Session 120: “Customer First” Strategic Account Management

Presenters: Dr. Stephen Timme, President and Founder of FinListics Solutions, Ben Cagle, Chief Customer Solutions Officer, FinListics, Joel Schaafsma, Research General Manager, SAMA

In today’s business environment of economic uncertainty, rapidly changing business models, dynamic customer demands, and intense competition, it is even more imperative to understand your customer’s financial and strategic priorities...and align your solutions and products with your customer’s financial outcomes.

Yet, research shows that executive buyers believe that almost 80 percent of enterprise sellers don’t understand their business.

This session begins with an overview of proprietary research conducted by SAMA and FinListics regarding current strategic account management trends and best practices...correlated with account management results, such as increased revenue. FinListics will then overview key elements and new insights for creating strategic, ‘customer

first' account management plans that are more relevant to customer executives. You will also receive a step-by-step template for applying these to your customers.

Topics:

- SAMA-FinListics Survey Overview
  - » Sources of key elements for 'customer first' strategic account management
  - » Best practices when engaging with customers
- FinListics: Key elements of customer focused strategic account management
  - » Company structure
  - » Company-wide goals and strategies
  - » Executive compensation
  - » Financial performance
  - » Individual stakeholders supporting company-wide goals and strategies:
    - \* Initiatives
    - \* Operational KPIs
  - » Aligning solutions with goals, strategies, and initiatives
  - » Identifying new opportunities
  - » Estimating financial benefits
  - » Tailoring messaging for individual stakeholders

---

### Session 121: How To Price For and Sell Innovative Ideas

Presenter: Peter Morelli, Vice President and Sales Consulting Practice Lead, Holden Advisors

Finding new ways to create value is critical in SAM. Monetizing that value effectively year over year? Even better.

However, we're all facing headwinds as investment

budgets are becoming more scrutinized and expectations around price justification are returning to pre-pandemic levels. SAMs need a simple approach for how to price innovative solutions in a logical, simple, and repeatable way to prioritize initiatives that drive sustainable growth.

In this session, you will learn how to:

- Use our Innovation Pricing Tools.
- Price new solutions in a simple and systematic way.
- Prioritize your innovations so you can co-create efficiently.

---

### Session 122: Deep Sales in Strategic Accounts: Adopting top-performer habits powered by LinkedIn

Presenter: Richard Wiltshire, Head of Key Accounts, LinkedIn

Strategic account managers are navigating a period of tremendous transition. Economic uncertainty, technology shifts, and hybrid work have created further demands on the profession. Today, buyers are better informed and more difficult to reach, with only 5% of the buyer's journey spent with a salesperson. In this session, we'll share research and best practices on how top-performer sellers and their organizations overcome these challenges by leveraging LinkedIn's Deep Sales platform.

Conference Track:

### SAM Program Design, Structure, and Management

Your SAMs don't work in a vacuum. Without having the right management systems and processes in place to enable them, all the talent in the world won't make a difference. Learn how the best companies make the business case for SAM, how they structure their SAM program, and how they align the strategic account management initiative with their larger corporate objectives. Sessions will cover issues related to internal alignment, executive sponsorship, account selection and deselection, and many other universal SAM challenges.

---

### Session 201: Practices for Engaging Senior Leadership: Creating motivation for senior leaders from the customer account and strategic account team to be part of the SAM team/program

Presenter: Dennis Chapman, Founder/CEO, The Chapman Group

More than ever, it is imperative to gain the support and active involvement of influential senior leaders of both the account and strategic supplier. This workshop will explore the "why and how" to keep their continuous involvement and support, as it is becoming increasingly more difficult for a SAM program to deliver the expected value without senior leadership participation. The content focuses on going beyond traditional executive sponsors to gain the support of the most senior leaders, to buy into and become actively involved in strategic account management (SAM). Key learnings of this session include:

- What motivates and convinces anyone to participate
- Important role and responsibilities for those senior leaders involved
- Practices that will encourage senior leadership participation
- Metrics that matter to senior leaders
- Challenges and possible solutions to gaining involvement

---

## Session 202: Enhancing the Impact of Strategic Account Management Programs

Presenter: Dr. Hajo Rapp, SVP & Sales Excellence, TÜV SÜD

Hajo Rapp is one of those rare individuals who has experienced key/strategic and global account management from a wide variety of perspectives, academically, as well as practical. He has been successfully running the global CAM programs of Siemens for more than 10 years and has run the TÜV SÜD strategic account management program for five years now. During this session, he will provide insights and lessons learned from introducing and operating these programs.

Topic covered will be:

- The challenge of being a SAM
- The journey of the SAM programs at Siemens and TÜV SÜD
- The big five for gaining impact when managing a SAM program
- Current practices on multichannel, especially on account-based marketing

## Session 203: Building a ONE VOICE SAM business transformation : A BI Canada journey

Presenters: Dominique Côté, Owner & Founder Cosawi and Principal, The Summit Group; Stephanie Joshi, One Voice Lead and Health Care Affairs Manager, Boehringer Ingelheim Canada

Starting a SAM journey to impact your end customers and the patient and shifting to work differently with your most important client, while adopting an outside-in mindset is a journey and a business transformation. It requires alignment around your most important customers, executive engagement, and takes leadership and many passionate people to make this a success. In this session, you will have the opportunity to hear, exchange, and discuss with your peers, and gain insight and tips based on the experience in kicking off One Voice in 2019. You will also hear about the journey and the status after three years — how the roadmap was created, and what were the trial and errors along the way. The presenters will focus on areas of interest from the attendees and facilitate table discussions to foster sharing and overall attendees' exchange.

Some of the BI topics covered are:

- The why: Starting with identifying the pain points to create the story and gain momentum of why it is important to do this as well as create a sense of urgency.
- Aligning leadership: How to align leadership to ensure that SAM journey becomes a strategic imperative and global priority.
- Creating the roadmap: Having a vision to help establish, implement, and sustain.
  - »What is the methodology?
  - »What are the steps?
- Creating the methodology and changing the mindset: Starting small while providing the next two-to-three

year journey, to communicate the needs and gain acceleration.

- Developing capabilities
- What next: What are the next steps and aspirations?

We will provide a high-level journey, best practices, and learnings from the Boehringer Ingelheim Canada journey and will use it to define focus and deeper dive sharing based on the audience preferences. You will have the opportunity to think about how to apply them in your own journey in a relevant manner.

**Think big but start small.**

---

## Session 204: It's Not Copy & Paste: How to scale an award-winning KAM program across regions and business segments

Presenters: Sara Theis, Program Leader, Key Account Management, Owens Corning; Jay Persinger, Director of Sales, Owens Corning

After building and industrial materials leader Owens Corning (OC) was recognized as SAMA's "Outstanding Young Program of the Year" in 2022, company leaders were clamoring to replicate this winning recipe across regions and business segments to drive more organic growth from its existing customer base. OC KAM Program Leader Sara Theis walks you through their journey as they expanded the program from North America to South America, Europe, and India, as well as a less-mature business segment — each with their own unique differences and challenges. This session will include key learnings and practical advice, especially helpful for those companies looking to scale their KAM programs for greater business impact.

## Session 205: Creating a Successful Strategic Account Team

Presenters: Richard Santucci, Sales Consultant, S&H Strategic Sales Consulting LLC; David Hughes, Sales Consultant, S&H Strategic Sales Consulting LLC

It is well known that a successful SAM program needs to be an enterprise-wide effort. To that end a successful strategic account team requires participation and commitment from many different parts of the organization, including top management. This session begins by describing the characteristics of a healthy and effective strategic account team. We will discuss the key pieces of the account plan that all team members must understand. Next, we will review the functions that should be part of the team and the contributions they are expected to make, as well as the structure of the team itself. Key organizational elements will be discussed, as well as team activities that are critical to team success. Finally, we will review compensation incentives for team members and some common team challenges.

Those attending this session should leave with an understanding of how to build and maintain an effective strategic account team.

---

## Session 207: Third Box Reframing: Design Thinking to Help Your Customer Reframe Their Game

Presenter: Shakeel Bharmal, SVP, The Summit Group

The best leaders in any industry have a set of common characteristics, including the ability to reframe the game for their company and sometimes their industry. Think about how Adobe's Shantanu Narayen shifted the

vision from providing creative desktop tools for websites to powering digital customer experiences. Or how Eaton moved from being a vehicle component manufacturer to a leading energy management company. As your customers reset and reinvent, they need partners that will bring their best to co-create and align strategy across the value chain from their own company, through to their customer's company, all the way to the end customer.

This session will enable you to leverage the power of individual ideation, group creativity, and customer centricity to co-create a future value narrative for your customer with strategic alignment to the shifting needs of their end customer. We will share some simple, yet transformative approaches to change the way you look at your customer, their customer, and unleash your personal genius to create value as a strategic advisor. You will leave this session feeling more confident in your skill set, mindset, and experience set — and you will be eager to apply what you learn the following day. We will explore the topics of creating an end-user persona, defining your customer's business compass, structuring simple individual and group ideation for creative breakthroughs, and translating this creativity into how you can impact your customer's business.

---

## Session 208: The Future of Strategic Account Management: Building a world-class organization in an omnichannel world

Presenters: Jennifer Stanley, Partner, McKinsey & Company; Mark Williams, Associate Partner, McKinsey & Company

In order to thrive in an omnichannel world — where two-thirds of enterprise buyers opt for remote interactions or

digital self-serve, and where the companies that gained the most market share in the past year offered 10 channels (vs just five in 2016) — strategic account teams must evolve their operating model, structure, and capabilities to meet their customers where they are, with the right message, at the right time, and on the right channel.

McKinsey leaders, Mark Williams and Jennifer Stanley, will provide an overview of the seismic shifts in go-to-market approaches, including specific examples of how Strategic Account teams are reorganizing and overhauling their operating models. They will share the challenges and opportunities that strategic account teams face as they rethink their operating and engagement models to deliver best-in-class customer experiences and activate sustainable growth. Lastly, Mark and Jennifer will provide each participant a worksheet on KAM capabilities with a scoring system against best practice that participants can use to self-assess and identify priority areas of focus when returning with their teams after the SAMA conference.

---

## Session 209: Matching Strategic Account Management Programs to Today's Buyers

Presenter: Martyn Lewis, Founder & CEO, Market-Partners

Buyers are buying very differently today. Technology, socioeconomic trends, and the pandemic have all caused major disruptions in the overall buying journey. Expectations of account managers have changed. In this session we will share our latest research from talking to over 4,000 buyers about how they buy and what they expect from account managers. Participants will be guided through an interactive discussion about these trends and how we should be responding. We will offer a success formula for matching SAM programs and approaches, to

not only meet these challenges, but to clearly differentiate in this new world.

Among the topics we will explore:

- Changed buying behaviors.
- The expectations that buyers have of sellers, both good and bad.
- The disconnect between buyers and sellers.
- What buyers are really doing behind the scenes when we are selling.
- How SAMs can become more relevant to buyers.
- Why opportunities slow down or stop in the later stages of the buying journey.
- Why the focus must shift from a sales process to the buying process.
- The new role of the SAM.

---

### Session 210: Improving a Strategic Account Management Program: Action research in strategy implementation

Presenter: Guilherme Rossi, Customer Engagement Program Manager, Hypertherm Associates; Costin Lonescu, Strategic Account Manager, Hypertherm Associates

A strategic account management program is under implementation, as part of a strategic change in Hypertherm. Within a challenging context, the program was deployed in 2018 and grew to 15 SAMs worldwide, affecting different fronts of the Hypertherm business. The program was internally challenged year after year, creating more complexity in its original targets. Making strategy work is more complex than making strategy, which is no different for a strategic account management program. This session, will navigate through the early stages of the program, the challenges the organization

faced in implementing it, and the current research to assess, improve, and see to its maturity.

---

### Session 211: SAM Implementation: How to kick-start the process

Presenters: Liz Pettinger, Director of Key Account Management and Operations, Bellevue University, James Degner, Key Account Manager, Bellevue University, Todd Lardenoit, Director, Community College Transfer, Bellevue University

Implementing a SAM program within your organization can feel overwhelming — especially if you are the sole leader responsible for exploring the opportunity, aligning the teams, and executing on it. In this session, you will learn how to navigate a phased approach for the beginning stages of the initiative. This systematic process helps you prepare an initial roadmap and the metrics needed to prove to external departments that the practices are worth supporting.

Key Takeaways:

- Learn how to analyze and discuss the specific Key Performance Indicators needed to align important SAMA theories with your company's strategic plan.
- Identify gaps across departments and utilize specific SAM methods to monitor success.
- Design a phase-by-phase approach to implement SAMA techniques in an organization new to using strategic account management.

---

### Session 212: The Road from Transactional Vendor to Strategic Business Advisor

Presenters: Denise Juliano, Group Vice President, PINC AI

Applied Sciences, Betsy Westhafer, CEO, The Congruity Group

The greatest insurance policy you can take out on yourself as a SAM centers around the kinds of relationships you build and with whom to build them. To reach the highest pinnacle of success, your customers must view you as a strategic business advisor rather than a transactional vendor.

In this session, SAM veteran and SAMA board member Denise Juliano, Group Vice President PINC AI Applied Sciences, will share examples of how she has been able to successfully position herself and her organization as an ally that helps her customers make good business decisions, locking her in as a valued and deeply trusted partner in the customers' growth.

Denise is joined by Betsy Westhafer, CEO of The Congruity Group, a consultancy focused exclusively on executive-level customer engagement programs and strategic customer advisory boards. Through an intentional and methodical approach, Betsy helps SAMs and their senior leadership teams engage with customers in a deeply meaningful and impactful way, securing their position as a vital strategic business advisor.

Together Denise and Betsy will help SAMs and senior leaders understand the proven path of learning, planning, executing, and elevating customer relationships.

Attendees will learn:

- How to build essential skills including emotional intelligence, relationship building, and positioning.
- How to discover hard-to-find and highly impactful information to take back to your customers.
- What it means to be intentional and methodical in relationship building and why it's your #1 competitive advantage.



## Session 213: Pursuit of KAM Excellence: Evolving your people, process & program

Presenter: Steve Andersen, President and Founder, PMI

What better way to launch your SAMA Annual Conference experience than by sharing your SAM/KAM success at the world's largest gathering of account-planning and management thought leaders and practitioners! Step back and reflect on the critical factors that determine successful journeys to SAM/KAM excellence.

This conference pre-session will feature SAMA member Boehringer Ingelheim (BI), with emphasis on their implementation of key account management, as we unpack the high-impact areas of focus that have contributed to the success of their award-winning KAM program. You will hear firsthand how BI has addressed the challenges of large-scale KAM deployment, plus you will have opportunities to benchmark your own progress against a proven model of KAM effectiveness.

Topics and focus areas to include:

- Executive sponsorship and KAM program support
- Cross-functional account team engagement
- Proactive leadership coaching and review
- Institutionalizing executive account briefings (telling your account story)
- KAM adoption and sustainability
- Certification and KAM talent development
- Third party validation and voice of the customer

PMI will facilitate discussion with BI's expert panelists, who will share relevant insights and specific examples of how they have evolved their people, process, and program in the pursuit of world-class account planning and management. The session will close with identification of lessons learned and "main thing" takeaways that you can apply to your own personal journey to SAM/KAM excellence!

Conference Track:

## SAM Talent: Recruiting, Hiring, and Retaining Top People

SAMA research shows that nothing influences the success or failure of a strategic account management initiative more than the leadership capabilities of the SAM. Is your organization screening for the right traits, attracting the best candidates, and then enabling your SAMs with the technology, coaching, and organizational mettle they need to thrive? Enable your SAM teams by implementing efficient global processes and smart digitalization strategies, and learn to screen for tough-to-train traits that correlate with SAM success.

### Session 301: SAM Performance — Next Level!

Presenters: Karlheinz Neuer, Principal, The Summit Group; Joshua Dey, Senior Vice-President Global Accounts, The Summit Group

This session will provide you with pragmatic, tangible, and action-oriented insights about the critical drivers of SAM motivation and high performance. And, because knowing means nothing without doing, we will also consider how to immediately activate these insights to elevate and accelerate SAM performance.

### Session 302: Be Here, Now

Presenter: Frank Helfenstein, Global Account Leader, MBA, CSAM

In a world of information overload, increasing demands, and uncertainty, are you prioritizing the 'right things' to meet personal and client objectives?

Sometimes we are not present — or 'in the moment' — and therefore we might be missing opportunities that are right in front of us.

Key questions to thrive in this practical session are:

- What are you focusing on right now and why?
- How can you be present while organizing yourself to

get it all done?

Challenge yourself. Learn proven tools and strategies that are easy to implement, and help your clients while being authentic and true to yourself, this session is for you.

Doesn't sound like a typical session for a SAMA conference? Maybe not. Challenge yourself to think in a new way.

### Session 303: SAM Incentives, Benchmarks, and Best Practices

Presenter: Kunal Shah, Principal, ZS

ZS' Kunal Shah and SAMA's Joel Schaafsma will highlight some of the findings from the recently concluded 2023 study on SAM compensation, and will offer additional perspective on the results. Additionally, they will address common questions about compensation that were captured during the study, and give participants an opportunity to ask questions.

This study is the most comprehensive survey of SAM compensation practices available today and was designed to establish benchmarks and track market trends related to:

- Profile, responsibilities and job scope
- SAM program practices
- Market compensation levels and incentive mix
- Pay plan type, structure, metrics, and timing
- Performance measurement and sales crediting practices



Attended by companies such as:



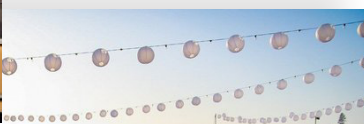
“I really look forward to attending a SAMA Annual Conference because it’s an invaluable and enriching experience. ... There are lots of best and next practices talked about and demonstrated. Secondly, there’s a great deal of networking opportunities. And thirdly, there is a really good opportunity to benchmark my performance and my organization’s performance.”

– Geoff Quinn, Dir. Key Account Management Center of Excellence,  
Pfizer Biopharmaceuticals Group

“It was just excellent. This was my first experience with SAMA and I am humbled by the brain trust and passion for strategic account management. Our breakout session group was extremely engaged. We connected afterwards and might establish a quarterly cadence to keep in touch. Our company's participants regrouped and all contributed one to two things we learned we are incorporating immediately into our customer success account strategies.”

— 2020 attendee

<https://bit.ly/SAMA2023ConfReg>



Conference Venue

## Hotel del Coronado, Curio Collection by Hilton

A living legend for more than 130 years, The Del celebrates its rich history as the proud host to celebrities, royalty, U.S. Presidents, and beach-loving guests for generations. Built in 1888 by Elisha Babcock, Jr., and Hampton L. Story and designated a National Historic Landmark in 1977, this historic beach resort is a San Diego icon.

Venue address: 1500 Orange Ave, San Diego, CA 92118 <https://hoteldel.com>

SAMA Rate: \$289 + Tax

Reservation Link: [SAMA / Hotel Del Coronado Reservation Link \(AC23\)](#)

Reservation cut-off is Friday, April 28, 2023 (5:00 pm PST) OR when the SAMA Block of rooms is FULL.

**Cancellation Policy:** If you cancel your reservation less than 3 days prior to arrival, you will be charged for one night's stay room and tax.

Questions? Contact Rhodonna Espinosa at [espinosa@strategicaccounts.org](mailto:espinosa@strategicaccounts.org).

<https://bit.ly/SAMA2023ConfReg>

# SAMA 2023 Annual Conference

## May 23-25, 2023

Individual Pricing	Corporate Member	Individual Member	Non-member
Full Price (through conference)	\$2,595.00	\$2,795.00	\$2,995.00

Teams Pricing*	Corporate Member	Individual Member	Non-member
Full Price (through conference)	\$2,395.00	\$2,595.00	\$2,795.00

*\*A team is considered 8 or more paid registrants.*

**REGISTER NOW**

### Who should attend?

SAM program directors  
Strategic/global/key account managers  
Account team members  
Sales & marketing executives  
Senior management (business units & geographies)  
Field sales supporting strategic customers  
Sales support & operations  
Sales training & development  
Human Resources  
Chief sales officers

## IMPORTANT REGISTRATION INFORMATION & POLICIES

### Confirmation of registration

Confirmation of registration will be sent via email. If you do not receive confirmation within 24 hours, please contact our team at [registration@strategicaccounts.org](mailto:registration@strategicaccounts.org) or call us at +1-312-251-3131 and press option 3.

### Payment

Payment in full is required in order to process registrations. We welcome payments in the form of American Express, Visa, MasterCard, Discover, and wire transfer. Please contact SAMA at [accounting@strategicaccounts.org](mailto:accounting@strategicaccounts.org) for the most current wire transfer information.

### Cancellation policy

Full credits will be issued up to 30 days from the start of the event. Full credit requests must be received in writing by 11:59pm CST on April 22, 2023. Within 30 days of the event, no credit will be issued. Credits will not be given for no-shows.

### Questions?

Please contact [registration@strategicaccounts.org](mailto:registration@strategicaccounts.org) or call us at +1-312-251-3131 and press option 3.



# What's the ROI?

## PROFESSIONAL DEVELOPMENT

- Learn directly from best-in-class companies what works for them, what challenges they have had to overcome, and what others are doing to prepare for the future of strategic account management.
- Learn tools, methodologies, and mindset shifts from the world's foremost experts and thought leaders.
- Grow your network by making one-to-one connections with seasoned practitioners, consultants, and academics.

## RETURN, RETURN, RETURN

- If you're not learning and growing, you're dying. It's always been true, but it's even more so as the pace of technology-driven change accelerates. Just one or two choice insights can repay your cost of attendance many times over.
- Take what you learn back to the office, become a coach and thought leader in your organization and for your customers.

**On average, SAMA members report double the growth rate for strategic accounts vs. non-strategic accounts.**

“For me, attending the SAMA Annual Conference is of value for two great reasons. Number one, the wealth of topics covered. Number two, is the exchange with like-minded people from different backgrounds but with similar needs and intentions all focusing on key account management improvements, professionalizing the approach, and driving impact.”

– Helmut Maßer, Sales Excellence, Siemens AG

Thank you to our sponsors:

