



# LEAD WITH *AGILITY*

**SAMA 2024 Annual Conference**  
**May 21-23, 2024**

Fontainebleau Miami Beach | Miami, FL

<https://bit.ly/SAMA2024>





# LEAD WITH *AGILITY*

The world has experienced great change over the past few years. Every industry has been affected. Every company and organization has had to adjust strategies, tactics, and even priorities. We now live in a world of constant flux, with conditions shifting almost by the day. To survive and indeed thrive in these circumstances requires not just leadership but agile leadership. The ability to change direction and focus as the situation demands is crucial for success in 2024 and beyond.

## 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 non-commercial 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.



# 2x



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

<https://bit.ly/SAMA2024>

# AGENDA at a glance

(Conference agenda is subject to change)

## Monday, May 20

4:00pm - 7:30pm Registration Opens  
5:00pm - 6:00pm Bonus Session  
6:00pm - 7:30pm SAMA Happy Hour

## Tuesday, May 21

8:30am - 9:30am Keynote  
10:00am - 11:15am Concurrent Sessions  
11:45am - 1:00pm Concurrent Sessions  
1:00pm - 2:00pm Lunch  
2:00pm - 3:15pm Concurrent Sessions  
3:45pm - 5:00pm Concurrent Sessions  
5:15pm - 6:15pm Peer Exchange and Sponsor Social  
6:30pm - 9:30pm 60th Anniversary Dinner Event

## Wednesday, May 22

8:30am - 9:30am Keynote  
10:00am - 11:15am Concurrent Sessions  
11:45am - 1:00pm Concurrent Sessions  
1:00pm - 2:00pm Lunch  
2:00pm - 3:15pm Concurrent Sessions  
3:45pm - 5:00pm Concurrent Sessions  
5:00pm - 6:30pm Networking Reception

## Thursday, May 23

8:30am - 9:30am Keynote  
10:00am - 11:15am Concurrent Sessions  
11:45am - 1:00pm Concurrent Sessions  
1:00pm Conference Adjourns

“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

“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

“Connecting with peers can be very therapeutic because many of us are leading large change initiatives. It’s great to hear from those in the trenches, fighting the good fight.”

– Sarah Theis, *Program Leader*, Owens Corning

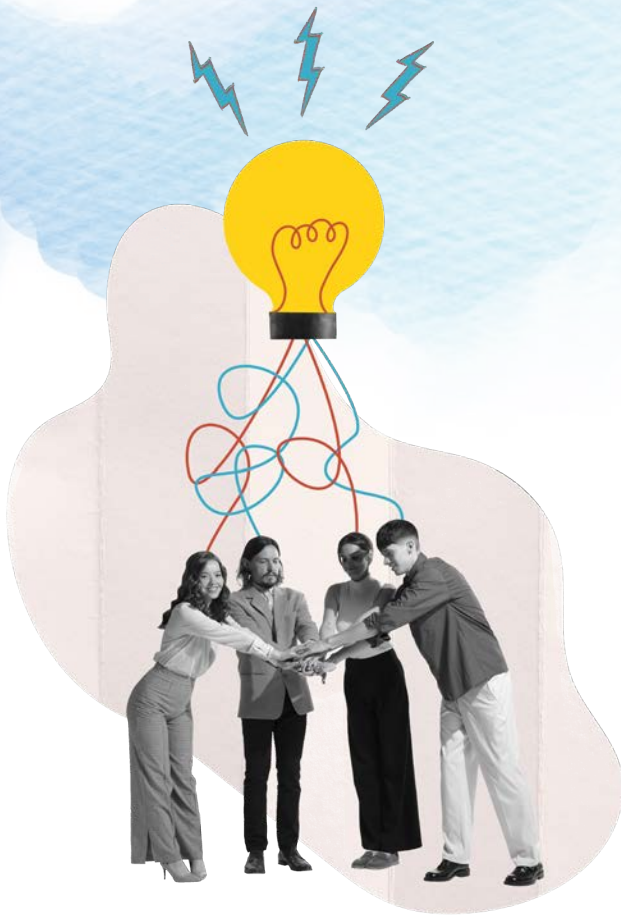
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# conference TRACKS



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.

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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.

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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.

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## A Conversation with Miguel Gonzalez and Tom Derry



Tom Derry  
*CEO*  
Institute for Supply Management® (ISM®)



Miguel Gonzalez  
*Chief Procurement Officer*  
DuPont

## How Big Things Get Done



Dan Gardner  
Risk Management, Forecasting, and Big Projects  
Award-Winning Journalist | Bestselling Author

## The Inner Game of Breakthrough Performance



Hitendra Wadhwa  
*Professor*  
Columbia Business School

keynote  
**SPEAKERS**

# conference SESSIONS

For session updates, visit: <https://bit.ly/SAMA2024>

In 2023, attendees rated SAMA's Annual Conference speakers and content 4.6 out of 5 stars.



Led by seasoned practitioners and experts, our sessions are infused with practical wisdom derived from hands-on experience. At SAMA, we create a dynamic think tank of like-minded peers who are eager to collaborate, push boundaries, and share your drive for success.

## **Bonus Session: Developing Talent to Attain and Sustain SAM Excellence**

Presenters: Steve Andersen, *President and Founder*, Performance Methods Inc. (PMI); Craig Jones, *Managing Director*, PMI; and Todd Lenhart, *Managing Partner*, PMI

Featuring SAMA 2023 Excellence Award Winners: *Boehringer Ingelheim* and *LP Building Solutions*

You're invited to kick off the 2024 SAMA Annual Conference with a facilitated panel discussion focused on what has become a priority for every organization in the SAMA community: developing the talent to attain and sustain SAM excellence.

Global employers are being impacted by talent shortages, and most expect the problem to only get worse in 2024. Add the challenges of disruption in execution among the cross-functional teams responsible for engaging, managing, and growing your relationships with strategic and key customers, and the question becomes: "How can a commitment to SAM excellence help us develop and expand the talent of our account teams?"

This 60-minute, pre-conference bonus session will feature SAMA members *Boehringer Ingelheim* (BI) and *LP Building Solutions* (LP) — winners of the 2023 SAMA Excellence Awards for "Outstanding Mature Program of the Year"

and "Outstanding Young Program of the Year," respectively. Participants will gain insights into the high-impact talent development areas these organizations are prioritizing, with specific discussion and focus on equipping their teams in the following areas of best practice:

- Relationship Oriented: Building and sustaining trust-based customer partnerships
- Lead with Influence: Aligning and leading the cross-functional account team
- Customer Focus: Value co-discovery, differentiation, co-creation, and realization
- Strategic Thinking: Visioning and planning future success with strategic customers
- Effective Execution: Developing and executing plans to grow accounts and win opportunities
- Communication and Collaboration: Conducting and facilitating executive account and opportunity briefings

PMI will facilitate the conversation with BI and LP expert panelists, who will share relevant insights and specific examples of how they are developing their talent to attain and sustain SAM excellence. The session will close with identification of lessons learned and key takeaways that you can apply to your own personal journey of SAM excellence!

<https://bit.ly/SAMA2024>



## TRACK: CRITICAL SKILLS FOR STRATEGIC ACCOUNT MANAGERS

### Session 101: Strategic Account Manager Leader

*Recommended for NAM/SAM/GAM, managers of NAM/SAM/GAM, SAM program heads, director or other senior management SAM org. role, Talent Management/HR/Learning & Development*

Presenters: Ed Wallace, *Managing Director, AchieveNEXT*; Grant Wallace, *Strategic Account Manager, AchieveNEXT*

Based on Ed Wallace's #1 best-seller *The Relationship Engine*, this program focuses on how strategic account managers (SAMs) can transform their approach from "just managing accounts" to leveling up their performance through influence to become the true value proposition for their business performance.

Topics include those listed below.

- The five principles of relational leadership.
- How to display worthy intent and deliver on its promise.
- Caring about people's relational GPS — goals, passions, and struggles.
- Making every interaction matter regardless of how minor.
- Valuing people before processes — people first.
- How to connect performance to a purpose — what are you really here for?
- Understanding the impact of strategies for customers, peers, and advocates.
- How to apply the relational agility process to launch, advance, and sustain important business relationships.
- Relationship action planning in support of specific objectives.

### Session 102: Agility Mastery for Strategic Account Managers: Exploring the Five Pillars of Success

*Recommended for NAM/SAM/GAM, managers of NAM/SAM/GAM, SAM program heads, director or other senior management SAM org. role, Talent Management/HR/Learning & Development*

Presenter: Shakeel Bharmal, *SVP, The Summit Group*

The concept of agility stormed the business world in the early 2000s, initially influencing technology development. Over the years its meaning has evolved, expanded, and sometimes been misconstrued. Now, more than ever, strategic account managers need a clear understanding of agility's transformative power.

Dive deep into an immersive workshop where we'll decode the five quintessential agility types every SAM must harness for unparalleled success:

- Business model agility: Flexing with changing business dynamics
- Execution agility: Delivering with precision and speed
- Communication agility: Engaging stakeholders with clarity and charisma
- Emotional agility: Navigating challenges with resilience and empathy
- Learning agility: Continuously evolving by absorbing and applying new insights

Engage in a collaborative dialogue where participants can candidly discuss their journey with agility: the hurdles, the victories, and the learning curves. Craft a personal Agility Action Plan, focusing on one transformative action that can amplify your impact on customers, elevate your influence in your organization, and bolster your personal growth trajectory. Join us, and embark on a path of agility mastery designed exclusively for the modern-day SAM.

### Session 103: Driving Proactive Account Expansion in Challenging Times: How top-performing SAMs and KAMs "plan to grow"

*Recommended for NAM/SAM/GAM, managers of NAM/SAM/GAM, SAM program heads, director or other senior management SAM org. role, Talent Management/HR/Learning & Development*

Presenter: Steve Andersen, *President and Founder, Performance Methods, Inc. (PMI)*

Participants will select a strategic/key account and benchmark against best practices for developing and executing strategies to accelerate account growth. Steve Andersen and PMI will provide participants with a proven approach for brainstorming, designing, building, and implementing an effective collaborative strategy to drive proactive growth with strategic and key customers in 2024 and beyond!

The session will begin with a self-assessment to help participants determine the current state of their account and growth strategy, providing a baseline from which to strategize proactive growth in strategic and key accounts. The focus will then shift to building an effective account growth strategy, as participants will explore how to leverage the "planning to grow" process through the application of best practices and tools to:

- Assess the current state of your account and growth strategy.
- Define the critical elements of an effective account growth strategy.
- Engage cross-functional team members in building account growth strategy.
- Leverage customer sponsors and your past proven value to gain momentum.
- Discover and explore future potential value targets for account expansion.
- Develop your account growth strategy and validate with the customer.

- Pressure test your account growth strategy and “plan to grow.”
- Activate your account growth strategy with prioritized action plans.

Specific areas of emphasis of this “how to”? session will include the primary dynamics of driving proactive growth in strategic and key accounts, leveraging customer sponsors, and aligning your past proven value with these stakeholders to accelerate growth, and implementing the critical success factors for developing and executing an effective account growth strategy. The session will close with participants identifying and prioritizing follow-up focus areas to strengthen their plans to grow.

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### Session 104: Navigating Growth: Lessons from John Deere’s accelerated SAM success

*Recommended for NAM/SAM/GAM, managers of NAM/SAM/GAM, SAM program heads, director or other senior management SAM org. role, Talent Management/HR/Learning & Development*

Presenters: Adrian Davis, *Principal Partner*, the Summit Group; James Robertson, *President*, The Summit Group; Laura Oelkers, *Strategic Account Manager*, John Deere Ag & Turf Division; and Brian Childs, *Sr. Strategic Account Manager*, John Deere Company

In this engaging and insightful presentation, we will be joined by members of John Deere’s strategic account management team. Together, we will uncover how John Deere’s implementation of a strategic account program and their partnership with The Summit Group led to a doubling of their business in just four years. These key account managers will shed light on how they harnessed strategic frameworks, including the Customer Compass™, Third Box Thinking™, and the Hero’s Journey, to drive unprecedented growth and build enduring relationships with their strategic accounts.

Key Takeaways:

- The Customer Compass™ advantage: Discover how John Deere leveraged the Customer Compass™ framework to gain a comprehensive understanding of their clients’ needs, preferences, and pain points. Learn how aligning their strategies with customer perspectives led to stronger connections and tailored solutions, resulting in accelerated business growth.
  - Embracing Third Box Thinking™: Dive into the concept of third box thinking and witness How John Deere’s strategic account managers harnessed this innovative framework to challenge conventional assumptions and explore novel opportunities. Understand how this mindset shift empowered them to create disruptive solutions that added value beyond expectations.
  - Embarking on the Hero’s Journey: Explore how the Hero’s Journey framework played a pivotal role in transforming routine client interactions into memorable and impactful experiences. Learn how this narrative-driven approach enhanced engagement, fostered trust, and positioned John Deere as the trusted ally in their strategic accounts’ growth stories.
- By attending, you will:
- Gain practical insights: Walk away with actionable strategies derived from John Deere’s firsthand experiences, ready to be applied to your own strategic account management approach.
  - Learn from experts: Hear directly from the strategic account managers who spearheaded the remarkable growth at John Deere and learn how they navigated challenges and seized opportunities.
  - Expand your toolbox: Acquire a deeper understanding of frameworks like the Customer Compass™, Third Box Thinking™, and the Hero’s Journey, and witness their transformative power in strategic account management.
  - Engagement and interaction: This presentation will be an

interactive dialogue between the key account managers from John Deere and representatives from The Summit Group. Attendees will have the chance to ask questions, engage in discussions, and gain firsthand insights into the practical application of these frameworks.

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### Session 105: Co-Creating Future Value with Strategic Customers

*Recommended for NAM/SAM/GAM, managers of NAM/SAM/GAM, SAM program heads, director or other senior management SAM org. role, Talent Management/HR/Learning & Development*

Presenters: James Robertson, *President*, The Summit Group; Max Walker, *Director of Strategic Account Management*, Medtronic

In an omnichannel AI world, co-creating future value with strategic customers is an imperative and is central to accelerating and sustaining growth.

This interactive session:

- Provides pragmatic frameworks, principles, tools, strategies, and tactics illuminating how to activate co-creation with customers.
- Illustrates what’s working and what not to do through real-life, leading practice examples.
- Draws on Medtronic’s experience, as the SAMA Excellence Award winner for Innovative Value Co-Creation in 2023. The session shares how Medtronic’s SAM program thinks outside the box to solve complex problems by engaging their company’s entire ecosystem in value co-creation, and by applying novel, innovative mechanisms to solve their customer’s problems, along with their customer’s customer’s problems.
- Provides the opportunity for peer-to-peer dialogue and exchange of insights.



## Session 106: Next-Level SAM: Developing fit-for-the-future strategic account management capabilities

Level: Expert/Next

*Recommended for NAM/SAM/GAM, managers of NAM/SAM/GAM, SAM program heads, director or other senior management SAM org. role, Talent Management/HR/Learning & Development*

Presenters: James Robertson, *President*, The Summit Group; and Dominique Côté, *CEO and Founder*, Cosawi and *Principal*, The Summit Group

Explore and deepen insights into organizational and people capabilities essential for next-level strategic account management impact.

Based on SAM thought-leader research identifying priority opportunities to advance and sustain next-level strategic account management this interactive session will:

- Reveal next-level SAM research findings and forward-focused insights into essential capabilities for future success with strategic customers.
- Explore how leading SAM organizations are activating these capabilities to accelerate and sustain next-level SAM impact.
- Engage with next-level SAM peers to discuss implications and action to future-proof SAM at your enterprise.

In collaboration with SAMA, the next-level SAM research has been conducted with world-class companies, recognized for best-in-industry customer engagement and value co-creation, to illuminate, guide, and sustain an enterprise customer-centric culture shift and develop mastery-level SAM capabilities.

Join us to chart the future of strategic account management and ensure your organization is fit for the future.

## Session 107: State of SAM – Global Trends in Strategic Account Management

*Recommended for NAM/SAM/GAM, managers of NAM/SAM/GAM, SAM program heads, director or other senior management SAM org. role, Talent Management/HR/Learning & Development*

Presenters: Richard Wiltshire, *Head of Key Accounts*, LinkedIn; and Sahar Anderson, *Head of Strategic Accounts*, LinkedIn

How has strategic account management evolved amid rapid changes in the economic and technological landscape? Discover the latest insights into the state of SAM professionals, based on exclusive LinkedIn data. Learn about hiring and skill-development trends, and gain valuable strategies for success in the face of economic challenges and the rise of generative AI. Join us to uncover the secrets of deep sales and how organizations who follow best practices outperform competitors by 50 percent.

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## Session 108: The Latest Research on How Customers Buy – and How This Impacts Strategic Account Management

*Recommended for NAM/SAM/GAM, managers of NAM/SAM/GAM, SAM program heads, director or other senior management SAM org. role, Talent Management/HR/Learning & Development*

Presenter: Martyn Lewis, *Founder and CEO*, Market-Partners

Buyers are buying differently and have different expectations of their suppliers. To meaningfully connect, and stay connected throughout the buying-journey lifecycle, account teams must embrace new approaches. This session shares research from mapping over 200 buying journeys and talking to over 4,000 buyers across multiple industries to bring new insight into how buyers buy in today's changing world. Building upon this research and sharing several highly pragmatic case studies, this session will help participants learn how to connect strategic account management to today's buyer.

The session will include:

- The No. 1 reason buyers stall or slow in their buying journey.
- The top five reasons that buyers don't seem to behave logically.
- Why forecasted business does not close as expected.
- The three traditional selling approaches that used to lead to success, but don't today.
- The keys to connecting today's selling with today's buying.

Each participant will get the opportunity to use a handout for developing their own plans for translating insights into immediate action.

The session will be interactive — with ample time for questions and discussion — and delivered in a highly engaging and energetic fashion by someone who has made this topic their life and passion.

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## Session 109: How to Utilize LinkedIn as an Operative SAM Tool

*Recommended for NAM/SAM/GAM, managers of NAM/SAM/GAM, SAM program heads, director, or other senior management SAM org. role*

Presenter: Mattias Westerman, *Strategic Account Manager*, Valmet

LinkedIn stands out as the preeminent customer relationship management (CRM) platform globally, offering real-time updates on key business leaders. As a strategic account manager, you have the unique opportunity to leverage LinkedIn as a dynamic daily feed, gaining insights into your customers' activities and updates on their strategic directions.

- Unlock the potential of your strategic account and key players: Elevate your strategic account management with LinkedIn as your real-time SAM dashboard. Gain valuable insights into your strategic accounts and their key players.

- Capture attention of initially uninterested customer executives: Explore techniques to become a notable presence even among customer executives initially disengaged from or uninterested in your offerings.
- Present efficient tools for enhanced SAM work through LinkedIn: Join Westerman as he introduces impactful tools designed to optimize SAM workflows by harnessing the potential of LinkedIn.

This presentation aims to provide practical insights and tools to empower SAMs in navigating the complexities of customer engagement through LinkedIn.

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### **Session 110: Mastering the Deal: The state of late-stage strategic account deal management**

*Recommended for NAM/SAM/GAM, managers of NAM/SAM/GAM, SAM program heads, director or other senior management SAM org. role, Talent Management/HR/Learning & Development*

Presenters: Carrie Welles, *Cofounder*, CloseStrong.ai &Think! Inc.; and Brian Dietmeyer, *CEO and Cofounder*, CloseStrong.ai &Think! Inc.

Join this session to benchmark yourself against industry leaders; identify improvement areas; and explore impactful investments in coaching, training, and technology. What are the latest trends in more effective closing of renewals and new opportunities? What should you invest in to improve win rates, deal quality, and deal outcomes? This new research, co-sponsored by SAMA and CloseStrong.ai, will help you know how you stack up and what you can do to improve.

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### **Session 111: Best Story Wins: Designing world-class sales messages, and delivering them with precision and agility** (Double Session)

*Recommended for NAM/SAM/GAM, managers of NAM/SAM/*

*GAM, SAM program heads, director or other senior management SAM org. role, Talent Management/HR/Learning & Development*

Presenter: Tim Pollard, *CEO*, Oratium; Craig Stephens, *Chief Customer Officer*, CAS; and Mark Bourgeois, *Executive Director*, Oratium

Even when your solutions are excellent, it's always hard to tell a complex story well, and it's getting more so as sales meetings become shorter and more unpredictable. We need to build outstanding sales narratives, but even if you have a great story, can you still tell it well enough if the customer cuts your time to 15 minutes? Or five? Or even if they ask you to deliver it in the parking lot (as happened to one of our clients recently)?

In this double workshop, Tim Pollard, CEO of Oratium, will unpack the two critical skillsets of world-class messaging.

Part #1: DESIGNING a world-class solutions story. We will discuss how to:

- Build messages that "fit" the way the brain works.
- Achieve true customer/problem-centricity.
- Articulate a clear and compelling value proposition.
- Achieve memorability and "re-tellability."

Part # 2: DELIVERING that message with "conversational agility." We will discuss how to:

- Prepare effectively for a critical conversation.
- Leverage questions for our advantage.
- Manage a conversation toward the outcome we desire.
- Communicate in a way that builds trust, and most importantly...
- How to master "conversational agility" – the ability to tell the story effectively, regardless of any unpredictable changes the customer throws at you.

Oratium is a leader in the field of sales messaging excellence. In both workshops, Tim and team will teach using examples from real client sales and messaging situations.

### **Session 112: Leading with Influence: Leveraging leadership competencies to co-create value both internally and externally**

*Recommended for NAM/SAM/GAM, managers of NAM/SAM/GAM, SAM program heads, director or other senior management SAM org. role, Talent Management/HR/Learning & Development*

Presenter: Craig Jones, *Managing Director*, Performance Methods, Inc.

Whether you are a SAM/KAM wanting to maximize your cross-functional team's potential or a SAM/KAM program manager needing to gain executive buy-in, the challenge remains: how can you effectively lead others who do not directly report to you? Over the years, we have heard many SAMs/KAMs say, "I have to work two sales cycles, one with my customer and one with my company." In today's matrixed and virtual work environment, leadership skills/competencies, once known as soft skills, now known as power skills, are more critical than ever.

In this interactive session, Craig Jones Managing Director of PMI and a current SAM will explore best practices utilizing the core skills/competencies needed for today's SAMs/KAMs and SAM/KAM program manager such as:

- Communicating, communicating, communicating
- Aligning the internal team across competing priorities
- Understanding the WIIFM (What's In It For Me) for each cross-functional team member
- Leveraging trust and credibility
- Inspiring action with a sense of urgency.

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### **Session 113: Leveraging Channel Relationships: How to persuade external partners to act on your objectives** (Double Session)

*Recommended for NAM/SAM/GAM, managers of NAM/SAM/*



*GAM, SAM program heads, director or other senior management SAM org. role, Talent Management/HR/Learning & Development*

Presenters: John Shulman, *President*, Alignor; Ayse Ceynur Nak, *Founder*, Leappo LLC and *Adjunct Professor*, Bologna Business School; and Patrick (Pat) Murzyn, *Head of Systems Design and Development*, Alignor

Channel relationships can play an essential role in our ability to meet our business objectives! When aligned with our priorities, channel partners can supercharge our results; but when actively or passively resisting, channel partners can undermine our effectiveness. Learn how to obtain buy-in and build alignment with external partners by understanding their business models, how to measure and reward performance, and how to establish accountability.

In this interactive, hands-on workshop, you will apply a proven framework and tools that help you transform underperforming channel partners into motivated allies who “sell” you and your offering effectively. During the workshop, you will participate in realistic online simulations that allow you to role-play typical interactions with channel partners. This interactive and practical workshop is led by negotiation experts with decades of experience in working closely to implement channel strategies with large organizations. You will be able to apply the methodologies and tools from the workshop right away. Learn how to improve key channel relationships and unlock value that has previously eluded you!

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### **Session 114: The 10K: By far the most important document that SAMs/GAMs never read before meeting with client executives**

*Recommended for NAM/SAM/GAM, managers of NAM/SAM/GAM, SAM program heads, director or other senior management SAM org. role, Talent Management/HR/Learning & Development*

Presenter: Jacques Sciammas, *President*, Selling to Executives

In this session, a large-company CFO who chaired the Capital Committee responsible for the company's strategic investments and selection of vendors shares his real-life experience of what preparation sales teams must do before meeting with their client's C-level executives.

The 10K, an indispensable document required by all public companies that is rarely studied by sales teams, will be reviewed. You will learn which sections of this document are important, providing you with an inside view of what keeps executives up at night, thereby helping you identify pain points and sales opportunities. You will also learn how the top executives are measured and compensated, giving you the opportunity to link your proposals to these components – giving you credibility with CXOs and greatly differentiating yourselves from your competitors.

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### **Session 115: How CFOs Prioritize Investments and What They Look for in a Value Proposition** (Double Session)

*Recommended for NAM/SAM/GAM, managers of NAM/SAM/GAM, SAM program heads, director or other senior management SAM org. role, Talent Management/HR/Learning & Development*

Presenter: Jacques Sciammas, *President*, Selling to Executives

Understand how CFOs prioritize investments and how to position your proposal higher on the priority list. Understand the three components of ROI: NPV, payback, and IRR. Learn how to calculate and articulate the ROI of your solutions, as well as what ROI is needed for your project to be considered.

Demonstrate the financial value of your solutions with solid financial arguments and be able to answer and ask relevant questions. Develop a value proposition showing operational and financial impact that will convince the executives to invest, and to invest with you.

### **Session 116: Your Strategic Accounts Program as a Product**

*Recommended for NAM/SAM/GAM, managers of NAM/SAM/GAM, SAM program heads, director or other senior management SAM org. role, Talent Management/HR/Learning & Development*

Presenters: Brad Weintraub, *Senior Vice President of Strategic Accounts Program*, AVI SPL; Erin Belenky, *Director of Global Strategic Accounts Program*, AVI SPL; and Danielle Matteson, *Senior Director, Global Professional Services and Strategy*, Pure Storage

Drive better client experiences by understanding your strategic accounts program itself, as a product. Through the discipline to apply the SAM process to your team's efforts and aligning key performance indicators (KPIs) with your leadership's goals, you can drive C-suite engagement. Using product management and product marketing principles, you can define and quantify the value your program brings to your own organization as well as to your customers.

The team of presenters has worked together in various capacities at AVI-SPL to found and mature our strategic account programs. Danielle has recently taken a role to launch a new strategic accounts initiative at Pure Storage.

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### **Session 117: Build Story-Driven Messages**

*Recommended for NAM/SAM/GAM, managers of NAM/SAM/GAM, SAM program heads, director or other senior management SAM org. role, Talent Management/HR/Learning & Development*

Presenter: Michael Albert, *Senior Consultant and Communications Coach*, Vantage Partners

Ineffective communication can hold SAMs back, whereas tight, well-constructed messaging can set the tone of their customer relationships, inspire customer confidence, and ensure the SAM is seen as a trusted advisor.

Without productive communication, SAMs risk missed opportunities on deals, dwindling engagement and productivity, and diminished satisfaction — from both internal team members and valued customers.

In this session, BUILD POWERFUL STRATEGIC MESSAGES™ that address communication challenges head-on by equipping SAMs with four essential messaging skills that help deepen customer engagement and encourage productive communication to drive immediate, measurable business results.

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### Session 118: SAM Bootcamp (Double Session)

*Recommended for NAM/SAM/GAM, managers of NAM/SAM/GAM, SAM program heads, director or other senior management SAM org. role, Talent Management/HR/Learning & Development*

Presenter: Mark Shonka, Co-CEO, IMPAX

Description coming soon.

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### Session 120: Driving Innovation in Healthcare: Unlocking Strategic Partnerships between Life Sciences and Health Systems

*Recommended for NAM/SAM/GAM, managers of NAM/SAM/GAM, SAM program heads, director or other senior management SAM org. role, Talent Management/HR/Learning & Development*

Presenters: Joe Stevens, *Principal, ZS*; and Matt Ruple, *Principal, ZS*

Health systems continue to face existing and new challenges in 2024, and there's opportunity for life sciences to support these initiatives as strategic partners. While there are bright spots and success stories where this is occurring, health systems still primarily see life sciences as a **transactional vendor** rather than **strategic partners**. In this discussion

we will provide an understanding of the strategic priorities and challenges faced by HCOs and present our latest research findings on how life science manufacturers can **differentiate themselves** from competitors. We will also analyze a framework for identifying and **evaluating potential partners**, and **share best practices** for collaboration, value co-creation, and relationship management. Finally, we will demonstrate how to create an **action plan** for implementing and sustaining strategic partnerships, including monitoring progress, evaluating outcomes, and adapting strategies as needed.

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### Session 121: Strategic Negotiations for Account Managers

*Recommended for NAM/SAM/GAM, managers of NAM/SAM/GAM, SAM program heads, director or other senior management SAM org. role, Talent Management/HR/Learning & Development*

Presenter: Jeff Cochran, *Partner and Master Facilitator, SNI*

Understanding key business drivers, along with where negotiation value is coming from, allows SAMs to extract the most from their negotiations. This highly interactive session includes a four-person simulation that will teach you how to craft successful negotiation strategies and four negotiation guidelines. Whether you are looking to improve your skills or those of your team, join us!

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### Session 122: Creating a Powerful Competitive Strategy

*Recommended for NAM/SAM/GAM, managers of NAM/SAM/GAM, SAM program heads, director or other senior management SAM org. role, Talent Management/HR/Learning & Development*

Presenter: Dan Kosch, Co-CEO, IMPAX

As SAMs, we are constantly assessing our competitive

advantage as we compete for our customers' business. Our solutions, pricing structure, and support efforts are key elements of our competitive positioning, but perhaps our most significant competitive advantage is how we as SAMs do our jobs. Unfortunately, many of us are so busy delivering to our customers' expectations that we lack the time it takes to create the right competitive strategy. When this happens, we are often left competing on someone else's terms, not our own.

In this session, participants will learn an efficient seven-step process for creating and leveraging a powerful competitive strategy. This process focuses on gaining crucial insights and leveraging these insights to compete in a way that is most likely to result in a successful outcome. This is an application-oriented session. Participants will be introduced to a tool used to walk through the seven-step process and apply the steps to their own high-value, real-world opportunity.

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### Session 123: Supercharge Account Strategies & Growth with 80/20

*Recommended for NAM/SAM/GAM, account team members/sales and functional support, managers of NAM/SAM/GAM, SAM program heads, director or other senior management SAM org. role, C-level/senior executive strategist, decision-maker, geographic head, executive sponsor, talent management/HR/Learning & Development*

Presenter: Mary Kate Phillips, *Vice President 80/20 Expert, Strategex*

The most valuable asset for a business Leader, commercial leader, and strategic account manager is one you cannot create: time. Is your time focused ONLY on the critical few initiatives and activities that drive exponential growth?

In this session, you will discover the transformative power of 80/20 strategies — how a radical focus on critical initiatives



leads to success. Unlock practical tools that enable you to channel your time exclusively towards those critical few activities, maximizing efficiency and impact. Liberate yourself from the weight of spending your time on many insignificant activities.

- How to use 80/20 tools to analyze revenue, sales, and growth opportunities within your customer base.
- How to transform strategic accounts into raving fans to drive loyalty and wallet share.
- How to strategically prioritize your sales funnel to drive 10X more growth.

## **TRACK: SAM PROGRAM DESIGN, STRUCTURE AND MANAGEMENT**

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### **Session 201: Integrating the Power of Marketing to Accelerate Engagement for Competitive Immunity**

*Recommended for Managers of NAM/SAM/GAM, SAM program heads, director or other senior management SAM org. role, C-level/senior executive strategist, decision-maker, geographic head, executive sponsor*

Presenters: Dominique Côté, *CEO and Founder, Cosawi and Principal, The Summit Group*; and Pierre Schaeffer, *Chief Marketing Officer, Thales Group*

Unlock the secrets of strategic account success through collective excellence: customer-led and team-enabled account-based marketing. In the ever-evolving world of SAM, one truth reigns supreme: The path to success is a collective journey, not a solo mission. Strategic account management is a team sport and takes a village. It is about time to integrate marketing into this journey.

Join Pierre Schaeffer, CMO of Thales, for an inspiring discussion that promises to provide pragmatic and insightful learning and will challenge conventional thinking.

Session highlights:

- Unleash your inner superhero team: Dive into the art of teamwork and collaboration. Explore how Thales integrated marketing strategies to drive growth and co-orchestrate account success.
- Boost transformative momentum: Learn about building the journey as Schaeffer and colleagues share their story of creating a robust account team with marketing integration while leveraging the marketing value. Learn how they ignited and sustained transformative change.

- Unlock your how-to strategies: Walk away with actionable insights to implement in your SAM journey, and more specifically, on how to help your marketing organization adopt the outside-in mindset to accelerate your account growth. Gain practical steps and strategies for success.
- Use your voice in the engaging discussion: Bring your questions, challenges, and experiences to contribute to the collective wisdom of the session.

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### **Session 202: Beyond the Grind: Adapting prices as your products (and markets) evolve**

*Recommended for Managers of NAM/SAM/GAM, SAM program heads, director or other senior management SAM org. role, C-level/senior executive strategist, decision-maker, geographic head, executive sponsor*

Presenter: Peter Morelli, *Vice President and Head of Sales Strategy, Holden Advisors*

Setting and attaining fair pricing can be one of the more painful parts of strategic account management. It's rarely one-and-done. After all, your customers, competitors, costs, and market dynamics all change — so your pricing should, too. But how?

Although value-based pricing is the goal for most, the ongoing alignment of price and value can get complicated and time-consuming. Without it, pricing mistakes can have a substantial negative impact on profits and overall account health. When it's done right, the buyer and seller share value in a way that benefits both parties and feeds the next round of innovative solutions and the growth of the partnership.

In this session, we'll share a pricing strategy framework to guide everything from your newest product innovations to your cash cow legacy solutions — so you can price with confidence over the short-, medium-, and long-term growth of your accounts.

You will learn:

- What the product life cycles are and how to determine where you sit.
- How to balance profitability and market share at each stage of the lifecycle.
- What steps you can take immediately to apply these concepts to your strategic accounts.
- How to continually assess competition and how to use this analysis to monitor value and adjust price via “health checks.”

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### **Session 203: Help, I May Lose My Biggest Revenue Customer: How to jumpstart a KAM program globally in 18 months**

*Recommended for Managers of NAM/SAM/GAM, SAM program heads, director or other senior management SAM org. role, C-level/senior executive strategist, decision-maker, geographic head, executive sponsor*

Presenters: Bill Collins, *President*, HAECO Americas, Airframe Services; and Paul Sheehan, *Managing Partner*, Taylor Group International

Bill Collins, President, HAECO America, Airframe Services, walks you through the company's journey that began with their largest revenue — a commercial airline customer — threatening to leave because of HAECO's internal focus on profit margins rather than on the customer's needs.

Bill will share a roadmap for our KAM journey in which you will:

- Learn how we replaced an internal focus on profit margin with a customer-centric focus with experienced KAMs.
- Discover how we quickly jumped from haphazard, verbally delivered account plans to thoughtfully written account plans.
- Learn from the pain we experienced (so that you don't have

to) as we implemented our new mantra: “If the account plan is not in writing, then it does not exist!”

- Follow us on our journey from internally reviewed account plans to insightful, business-focused plans that are shared with our key accounts twice a year. This approach allows our customers to share their true business focus and challenges in case we got it wrong in our written account plan.
- Understand how we completed a global introduction of our new KAM program in under 18 months and hear about our success stories with our commercial airline customers, won using our customer-centric approach.

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### **Session 204: Let's Explore the Critical Requirements to Effectively Drive Global Account Strategies**

*Recommended for Managers of NAM/SAM/GAM, SAM program heads, director or other senior management SAM org. role, C-level/senior executive strategist, decision-maker, geographic head, executive sponsor*

Presenter: Muriel Carroll, *Managing Director of Strategic Accounts*, Hilton

Join us in this session, as we explore the many critical elements needed to drive global account strategies. From global governance process, to leading and influencing without authority, it's essential that all global cross-functional team members be aligned and collaborate closely. Let's explore some of the nuances and obstacles our teams encounter and how best to divert and overcome them.

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### **Session 205: Transitioning from a Manual to a Technology-Enabled SAM Program**

*Recommended for Managers of NAM/SAM/GAM, SAM program heads, director or other senior management SAM org. role,*

*C-level/senior executive strategist, decision-maker, geographic head, executive sponsor*

Presenters: Chris Wells, *Director of Strategic Accounts*, bioMérieux; and Ulrik Monberg, *CEO & Founder*, ARPEDIO

Description coming soon.

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### **Session 206: Monetization of Investment in New Technologies and Solutions to Drive Profitable Sales and Growth**

*Recommended for Managers of NAM/SAM/GAM, SAM program heads, director or other senior management SAM org. role, C-level/senior executive strategist, decision-maker, geographic head, executive sponsor*

Presenters: Chris Pratt, *VP of Content and Delivery*, The Summit Group; and Chris Ferguson, *VP of Business Development*, The Summit Group

Today's business environment has seen an increase in the development of market-disruptive new technologies and solutions. Often, these solutions are sold into and through complex value chains of suppliers, manufacturers, distributors, dealers, and end-user customers. This sales environment makes it critical to accelerate market adoption to drive profitable sales and market share growth to monetize your organizations investment in the new technology or solution. It is essential that, as the provider of this new technology or new solution, you be able to identify the financial/economic impact of the technology or solution on each link in the value chain. If you do not understand this financial impact on each organization, it is possible that any one of the key links in the chain will perceive your solution as having a negative financial impact on them and will block your sales.

These links could be specific departments within your strategic account (operations, HR, commercial, distribution,



etc.). Or they could be downstream partners (distributors, dealers, etc.). The key to success is to understand the financial/economic issues and care-about of these constituents so that you can build and communicate a strong quantified value proposition to each.

This session, delivered by The Summit Group and, potentially, by John Deere, will provide a graphic example of how this situation is being addressed and the results achieved. It will provide a simple framework for SAMs to follow to perform this identification and quantification for each link in their specific value chain.

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### Session 207: Make Your Company Culture a Competitive Advantage

*Recommended for Managers of NAM/SAM/GAM, SAM program heads, director or other senior management SAM org. role, C-level/senior executive strategist, decision-maker, geographic head, executive sponsor*

Presenters: Heidi Tripp, *End Customer Program Manager*, Axis Communications; and Kerri Sutherland, *Manager, HR Business Partnerships*, Axis Communications

According to Deloitte, 94 percent of executives believe a strong company culture is key to business success. This indicator points to a critical question: How do you and your employees define your company culture?

This session explores the significance of company culture in today's business landscape and provides practical insights and strategies for building a culture that aligns with an organization's values, goals, and vision. Great cultures leverage their organization's unique purpose to strengthen their identity, inspire their employees, and deliver on their brand promise to customers. It's what can set you apart from your competition. Attendees will gain a deep understanding of the key elements that shape culture, learn best practices

from a successful organization, and discover effective ways to promote employee engagement, satisfaction, and productivity. Through expert presentations, interactive discussions, and real-world examples, this session will empower leaders to become catalysts for positive cultural change in their organizations, ultimately driving long-term success and sustainability.

By the end of the workshop, participants should be well-versed in the theories, strategies, and practical applications related to building a strong and sustainable company culture, enabling them to implement positive changes in their own organizations. Participants will also:

- Extract actionable insights from real-world examples to apply in participants' own organizations.
- Develop techniques to promote a positive work environment, fostering employee engagement and satisfaction.
- Become a catalyst for cultural change through new leadership skills to initiate and sustain cultural changes in their organizations.
- Develop plans and strategies to drive continuous cultural improvement for long-term organizational growth.

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### Session 208: Centering the Client Organization in Global Account Management Practice

*Recommended for Managers of NAM/SAM/GAM, SAM program heads, director or other senior management SAM org. role, C-level/senior executive strategist, decision-maker, geographic head, executive sponsor*

Presenter: Mark Forret, *Chief Commercial Officer - Global Office Group*, ISS World Services

During this session, focus will be on factors organizations should consider when structuring, implementing, or evaluating global account management partnerships, in

terms of compatibility, competency, corporate governance, and commercial outcomes.

The session will look at key enablers and barriers in global account management (GAM) today. Focus will be on four crucial doctoral research findings that organizations should consider structuring, implementing, or evaluating in GAM partnerships.

The Four Cs model

1. Compatibility
2. Competency
3. Corporate governance
4. Commercial outcomes

These findings will be presented to spur audience discussion during the session. The speakers will further delve into the characteristics of the "compatibility" component of GAM, which requires partnership, culture, relationship, and trust. Without necessary consideration of these characteristics, the likelihood of the global account's underperforming or failing is high.

Key Takeaways:

- GAM system development: Identify the findings from the conceptual model and sub-themes noted above and consider applying them when developing systems and processes that support global account management in practice.
- Develop compatibility: Outline the Four Cs model with emphasis on the elements of the compatibility theme.
- Considerations for a buying organization: Understand the commercial implications of the findings presented and be able to evaluate current and future organizational models as a result.

## Session 211: Building a High Performing Global Customer Team

Recommended for Managers of NAM/SAM/GAM, SAM program heads, director or other senior management SAM org. role, C-level/senior executive strategist, decision-maker, geographic head, executive sponsor

Presenters: Doug Beveridge, *Principal Partner*, The Alexander Group; and Craig Ackerman, *Principal*, The Alexander Group

Customer expectations, advanced technologies, and the competition are all evolving at an accelerated pace. What does it take to build and manage a high performing global customer team in an increasingly chaotic environment? It starts with a strong foundation: making sure you have the right roles, talent strategy, performance management, and compensation approach. Hear how leading companies are harnessing the power of convergence — people, process, and tech — to create global customer teams that are ready for 2024 and beyond.

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## Session 212: Stories of KAM Impact in Life Sciences

Recommended for Managers of NAM/SAM/GAM, SAM program heads, director or other senior management SAM org. role, C-level/senior executive strategist, decision-maker, geographic head, executive sponsor

Presenters: Namita Powers, *Principal*, ZS; Todd Burgess, *Manager*, ZS; Sheri Trutwin, *Head of Strategic Accounts*, Alnylam; and Beth Eastland, *General Manager*, Exact Sciences

Join leaders from Exact Sciences and Alnylam to learn about the success and learnings from their KAM programs. Alnylam's team of health system directors (HSD's) have more than 75 years of combined expertise in creating and managing relationships with organized customers. They

serve as the point of contact for a team-based, cross-functional approach to organized customer engagements with the goal of co-developing solutions that benefit patients, providers, and Alnylam.

Alnylam's HSD team was recently recognized by the Health Industry Research Center (HIRC) as "Best in Performance" when compared to similar account managers across life science organizations. Similarly, Exact Sciences is a company specializing in the development and commercialization of diagnostic tests, particularly in the field of cancer detection and screening. The company is known for its focus on noninvasive and early detection solutions and has seen recent success in its KAM program, while taking an enterprise approach to partnership with organized customers.

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## Session 213: Metrics and AI to Guide the Transformation Enabling the Journey: Transactional to a strategic, account-centric trusted resource

Recommended for Managers of NAM/SAM/GAM, SAM program heads, director or other senior management SAM org. role, C-level/senior executive strategist, decision-maker, geographic head, executive sponsor

Presenters: Dennis Chapman, *Founder and CEO*, The Chapman Group; and Phil Styrlund, *CEO*, The Summit 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. Unfortunately, most SAM programs are evaluated in terms of the sales numbers they post. Although sales numbers, usually defined as revenue and profitability, are critical measurements, there are additional key metrics to consider that give valuable insights into the probability of achieving,

or not achieving, the right organizational construct and the transformation to a highly productive customer-centric organization.

Key learnings of this session include:

- Performance metrics that provide value to your organization and on the dashboard.
- AI and relationship management: the connection to guide the way.
- Developing, communicating, and using relationship metrics.
- Launching metrics — what, how, by whom, and when?
- Challenges associated with any metric-based program.

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## Session 214: Metrics-Based Relationship Scorecard Panel Discussion: Internal/external insights that provide direction for action

Recommended for Managers of NAM/SAM/GAM, SAM program heads, director or other senior management SAM org. role, C-level/senior executive strategist, decision-maker, geographic head, executive sponsor

Presenters: Dennis Chapman, *Founder and CEO*, The Chapman Group; Nick Coletti, *Sr. Global Development Manager, Corporate and Strategic Accounts*, IDEXX; and Carla Cherrier, *Global Development Manager, Corporate and Strategic Accounts*, IDEXX

Strategic accounts expect strategic suppliers to know, anticipate, and even predict needs, market changes/shifts, and possible competitive advantages. To effectively meet these account expectations, strategic suppliers need to have an even greater in-depth knowledge, including new insights about their account. Senior leaders of accounts expect a strategic supplier to isolate opportunities for innovation and economic value creation and to provide a high probability of success based on facts and insights, not just intuition.

This workshop will provide a case-study example, directly from the strategic supplier themselves, about how utilizing customer facts and insights can create more effective and valuable account engagements.

Key learning points include:

- Scorecard: what it is and as a guidepost for mutual success.
- How to triangulate the right insights from the right team members.
- The challenges that customers and strategic suppliers — as “ONE” — face today.
- How our need for a scorecard was born (How did we get here?): rationale/generating internal excitement!
- Interpretation of insights from a KAM's experience/viewpoint that lead to mutually beneficial engagements and outcomes.
- Key summary points: The scorecard process, methods, and best practices.

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### Session 215: Unlocking Success with Winning SAM Recruitment & Development Strategies

*Recommended for Managers of NAM/SAM/GAM, SAM program heads, director or other senior management SAM org. role, C-level/senior executive strategist, decision-maker, geographic head, executive sponsor*

Presenters: Geoff Williams, *Interim President and CEO, SAMA*; and Dino Bertani, *Vice President, Head of Alliance Management, Zealand Pharma*

In today's competitive landscape, recruiting the right strategic account managers is crucial for sustained business growth. This conference session delves into the key learnings and takeaways for mastering these processes, finding and developing right people/competencies, and ensuring alignment with organizational goals and customer needs.

Key Learnings:

Strategic Account Manager (SAM) Recruitment & Development Best Practices:

- Identifying essential skills and competencies: Understanding the blend of sales acumen, relationship-building abilities, and strategic thinking required for effective SAMs.
- Behavioral interviews and scenario-based assessments:
- Implementing thorough screening processes to evaluate candidates' problem-solving skills, adaptability, and alignment with organizational values.
- Cultural fit and alignment: Prioritizing candidates who resonate with the company culture and demonstrate a passion for customer success.

Key Takeaways:

- Invest in talent: Prioritize recruitment efforts to attract and retain toptier strategic account managers who can drive long-term customer success and revenue growth.
- Understand the key competencies and behaviors necessary for highperforming SAMs.
- Continuous evaluation and adaptation: Regularly assess the effectiveness of recruitment and capability development processes, iterating based on feedback, and market dynamics to stay agile and responsive.

By embracing these best practices, organizations can optimize their strategic account management approach, fostering deeper customer relationships and driving sustainable business growth in an ever-evolving marketplace.

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### Session 216: Executive Sponsorship – Do it right!

*Recommended for Managers of NAM/SAM/GAM, SAM program heads, director or other senior management SAM org. role, C-level/senior executive strategist, decision-maker, geographic head, executive sponsor*

Presenters: Ron Davis, *EVP, Global Head of Customer Management, Zurich*; and Hajo Rapp, *SVP SAM & Sales Excellence, TÜV SÜD AG*

Executive sponsorship has been shown to be an integral component of successful strategic customer relationships, and more specifically where the senior executive's role is clear, structured and measured. Often companies do not formalize it and/or do not choose the “right” executives for the role, resulting in frustration for the SAM and for the customer.

Learn how to make effective use of executives to facilitate long-term, value-added relationships with your most strategic customers. All attendees will receive tools/templates to immediately put to use.

Key learnings will center on:

- Business case and strategy for creating and implementing a formal executive sponsorship program.
- Selection criteria and considerations for executive sponsors.
- Roles and responsibilities for both the executive sponsor and the strategic account manager.
- Executive sponsor metrics and accountability.

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### Session 217: Harmonizing Pfizer's KAM Program

*Recommended for Managers of NAM/SAM/GAM, SAM program heads, director or other senior management SAM org. role, C-level/senior executive strategist, decision-maker, geographic head, executive sponsor*

Presenters: Jerry Alderman, *CEO, Valkre Solutions, Inc.*; Jason Kraft, *Director, Customer Effectiveness - Key Account Management, Pfizer Inc*; and Mike Powers, *Principal, ZS*

Pfizer is on a journey to harmonize its KAM program. The objective is to improve the KAM function's ability to plan and execute with key accounts. This panel will discuss the Pfizer journey, from getting initial buy-in through implementation



and lessons learned. Discussion points will include:

- CRM for KAM process.
- Data capture for robust insights and reporting.
- Higher KAM satisfaction.
- Cross business unit (BU) visibility.
- Establishing a nimbler KAM infrastructure that continuously adapts to best-in-class.

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### Session 218: Elevating and Sustaining Your SAM Program

*Recommended for Managers of NAM/SAM/GAM, SAM program heads, director or other senior management SAM org. role, C-level/senior executive strategist, decision-maker, geographic head, executive sponsor*

Presenters: Harvey Dunham, *Managing Director, Strategy & Marketing, SAMA*; Sara Theis, *Key Account Manager, Owens Corning*; Denise Juliano, *Group Vice President, PINC AI Applied Sciences*; Jon Birrell, *Senior Vice President Global Key Accounts, Brenntag Group*; and Stephanie Sirt, *VP, Global Strategic Accounts, Schneider Electric*

Your SAM program should be focused on profitably, growing your business, and building relationships with your largest strategic customers. Therefore, you should never take it for granted. In this session, four seasoned SAM program leaders will discuss how they keep their SAM program thriving — internally and externally — including the best practices and insights they have discovered on their respective journeys.

### Session 219: From Beginning to Winning: Critical building blocks for building and sustaining a strategic accounts program

*Recommended for Managers of NAM/SAM/GAM, SAM program*

*heads, director or other senior management SAM org. role, C-level/senior executive strategist, decision-maker, geographic head, executive sponsor*

Presenters: Todd Lenhart, *Managing Partner, Performance Methods, Inc.*; Patrick Engkjer, *Head of Strategic Accounts – US, Sanofi Vaccines*; and Bob Grzenda, *National Accounts Lead - US, Sanofi Vaccines*

This session will outline and suggest elements necessary to launch and sustain an effective SAM program. Four critical building blocks will be included:

- Why do you need a SAM program?
- What critical success factors should you consider in your program blueprint?
- How do you build a program to address these critical success factors?
- How can you create value so that your customers feel the impact?

This highly interactive session will include live discussion with a thought leader in the SAMA space: Patrick Engkjer, head of Strategic Accounts at Sanofi Vaccines. You will leave with specific action to take if you are starting a SAM program or if you have already started a program and are looking for ways to benchmark your progress.

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### Session 220: Maximizing Growth: Strategic marketing for strategic accounts

*Recommended for NAM/SAM/GAM, account team members/sales and functional support, managers of NAM/SAM/GAM, SAM program heads, director or other senior management SAM org. role, C-level/senior executive strategist, decision-maker, geographic head, executive sponsor, talent management/HR/Learning & Development*

Presenter: Kaycee Kalpin, *Chief Marketing Officer, Premier, Inc.*

In today's competitive landscape, effective engagement with strategic accounts is paramount for sustained business growth. This session delves into the intricate realm of strategic marketing tailored specifically for key accounts. Participants will explore innovative strategies and best practices aimed at nurturing and expanding relationships with key accounts. From crafting personalized marketing initiatives to leveraging data-driven insights, attendees will gain actionable insights to elevate their approach to strategic account management. Join us to unlock the potential of strategic marketing and drive impactful outcomes in your organization's growth journey.

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### Session 221: Strategically Growing Key Accounts: A no-smoke-and-mirrors approach to driving explosive growth and improved customer satisfaction

*Recommended audience: Managers of NAM/SAM/GAM, SAM program heads, director or other senior management SAM org. role, C-level/senior executive strategist, decision-maker, geographic head, executive sponsor*

Presenter: Mark Allen Roberts, CEO and Founder, OTB Solutions

This 75-minute session will outline a proven process to drive explosive growth at key accounts. Four critical building blocks will be included:

- Assess the current state of data, voice-of-customer research, market and world events, team skills, and key account teamwork (drama-free execution).
- Plan your strategy to grow revenue and profits to help your customer achieve their goals.
- Measure what matters — KPIs and the importance of lagging indicators.
- Execute a collaborative approach to drama-free execution.

- Adjust by taking an agile approach toward new market and customer insights.

This highly interactive session will include live discussion with Mark Roberts, a thought leader in sales effectiveness and strategic growth. You will leave with specific actions to take if you want to drive explosive growth in revenue and profits in 2024.

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### Session 222: The New Frontier: How GenAI will revolutionize how we enable sales growth

*Recommended for NAM/SAM/GAM, account team members/ sales and functional support, managers of NAM/SAM/GAM, SAM program heads, director or other senior management SAM org. role, C-level/senior executive strategist, decision-maker, geographic head, executive sponsor, talent management/HR/ Learning & Development*

Presenter: Maria Valdivieso, *Partner*, McKinsey & Company

Discover the transformative power of Generative AI (GenAI) in revolutionizing sales growth. With the potential to unlock a staggering \$1.6 trillion in value across sales, marketing, and customer operations, GenAI promises to redefine every facet of the B2B deal cycle. Join us as we delve into its game-changing impact from digital demand generation to driving unparalleled customer success. Experience firsthand how GenAI is reshaping the future of sales enablement and accelerating business growth.

During our session, we will explore this new frontier and cover exciting use cases for GenAI in sales, as well as share learnings and best practices from early GenAI adopters.

## TRACK: SAM TALENT: RECRUITING, HIRING AND RETAINING TOP PEOPLE

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### Session 301: Be Here, Now

*Recommended for Managers of NAM/SAM/GAM, SAM program heads, director or other senior management SAM org. role, C-level/senior executive strategist, decision-maker, geographic head, executive sponsor, Talent Management/HR/Learning & Development*

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

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 for anyone 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?

If you want to 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 302: Agile Foundations, Gen AI Futures: Shaping next-gen SAM leaders

*Recommended for Managers of NAM/SAM/GAM, SAM program heads, director or other sr. management SAM org. role, C-level/senior executive strategist, decision-maker, geographic head, executive sponsor, Talent Management/HR/Learning & Development*

Presenters: Robert Box, *Head of International Business*, Mercuri International; and Sanchita Sur, *CEO*, Emplay

Rapid, nonlinear change dictates that robust and agile learning and development (L&D) initiatives in SAM programs are essential for long-term success. This presentation delves into best practices in the current L&D landscape and introduces forward-thinking approaches to propel SAM programs and their leaders into a future-ready era.

Topics covered include:

- Building a Robust SAM Program: Uncover the essential steps to craft a successful SAM strategy, ensuring alignment with organizational goals and responsiveness to the dynamic needs of key clients.
- Prioritizing Learning & Development: Highlight the critical importance of ongoing L&D, and gain insights into tools and techniques designed to nurture and elevate SAM talent.
- Deciphering SAM Competence Needs: Take a deep dive into the competencies that are pivotal for success, both now and in the future.
- The AI Revolution in L&D: Explore how AI is revolutionizing the learning landscape, providing personalized, efficient, and scalable strategies to enhance the skills of SAM professionals.
- Future-proofing Your SAM Strategy: Master the art of adaptability to ensure your SAM program remains resilient and relevant in the face of ever-evolving market challenges and opportunities.

To excel in today's business landscape, SAM leaders must strike a balance between remaining anchored in tried-and-true strategies and being receptive to innovative breakthroughs. This presentation is designed to arm attendees with the insights and confidence they need to navigate the dynamic intersection of agility and AI, priming them to spearhead the next wave of SAM excellence.

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### **Session 303: Who's Got Talent – A SAM program's journey that started with the people**

*Recommended for Managers of NAM/SAM/GAM, SAM program heads, director or other sr. management SAM org. role, C-level/senior executive strategist, decision-maker, geographic head, executive sponsor, Talent Management/HR/Learning & Development*

Presenter: Rachel Brutosky, Vice President, Strategic Accounts, Nilfisk

In 2020, Nilfisk, Inc., one of the world's largest providers of sustainable cleaning equipment, launched a disruptor SAM strategy founded on SAMA principles. It is a journey still in the making, but the program has evolved to become one of the most progressive in the industry, producing year-over-year growth and forging deep, sustainable customer relationships. An early focus of the strategy was on "SAM Talent, Selection, Development & Coaching," which SAMA cites as a key organizational success factor. During this 75-minute session, attendees will learn about Nilfisk's SAM journey which started with the "people" aspect of the program and will include:

- Building the SAM profile and job description.
- Completing SAMA's Individual Competency Assessment.
- Coaching to SAM competencies and the SAM sales process.
- Integrating competency development and trainings.
- Lessons learned and recommendations.

**"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





Conference Venue

## Fontainebleau Miami Beach Hotel

Fontainebleau is a luxurious hotel that opened in 1954 in Miami Beach, Florida. Boasting a beautiful blend of classic decor and modern amenities, the hotel made its name into the National Register of Historic Places in 2008. Aiming to please guests with lavish spas, comfortable rooms, and great dining options, the hotel is a popular tourist destination, having made several memorable appearances in television and in movies due to its striking beauty.



Venue address: 4441 Collins Ave Miami Beach, FL 33140 [www.fontainebleau.com](http://www.fontainebleau.com)

SAMA Rate: \$309 + 14% Tax per night

A one night deposit of (\$352.26) is required for each reservation at the time of booking (\$309 + \$43.26 tax).

**Hotel Fee Policy:** A daily Hotel Fee of \$39 + 14% Tax will apply to your reservation and is charged at check-in.

**Reservation Link:** [SAMA / Fontainebleau Miami Beach Reservation Link](#) OR Call 1-800-548-8886 and press the Group reservations option.

**Reservation Cut-off:** The cutoff for reservations is Friday, April 26, 2024 (5:00pm Eastern Time) OR when the SAMA Room Block is FULL.

**Hotel Cancellation Policy:** Advanced deposit equivalent to one night is refundable if the booking is cancelled 72 Hours prior to arrival.

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





# What's the ROI?

## 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.

## 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.

## Attended by companies such as:



# SAMA 2024 Annual Conference

May 21-23, 2024

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 21, 2024. 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.

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<https://bit.ly/SAMA2024>

