

# What type of Account Manager are you?

Consistent, quality Quarterly Business Reviews (QBRs) are the foundation of every strong client relationship. They're an opportunity to **deepen trust**, **showcase innovation**, **manage risk** and ultimately – **prove a supplier's value for the long-term**.



Yet, *in reality*, the way they are run varies wildly depending on who's in charge – a task that falls firmly into the hands of the Account Managers. And it's not always an easy job.

In Account Management, some obstacles are universal: unrelenting requests from clients, excessively tight deadlines, inconsistent data and ever-decreasing budgets. These are often unpredictable, and best dealt with reactively.

However, there's also a second set of obstacles: the Account Managers themselves. In this guide, you'll find descriptions of the five main 'types' of Account Managers and their individual challenges during the QBR process – plus key areas of focus to improve outcomes in the future.

So... What type of  
Account Manager are you?



# Visionary Victoria

**Victoria loves to talk about the future of anything and everything, whether it's in scope or not. When it comes to bringing new ideas to the table, she's an inspiration and clients love her because she's so forward-thinking.**

Victoria loves to start each QBR looking at innovation and 'the future'. However, because she tends not to focus on what's happening right now, she sometimes ends up frustrating both her clients and colleagues. Being a visionary is great... but if the basics aren't there for each review, this can cause problems.



## Likes

- **Big picture** – blue sky thinking
- Innovation
- Talking to the big cheeses



## Dislikes

- Reviewing **data**
- Looking backwards
- Talking business as usual



## How could Victoria improve her **QBR**s?

1

Have clarity of purpose: "What outcome do I want from this QBR?"

2

Structure an agenda in advance, which includes BAU and innovation

3

Have a clear follow-up plan of action



## Detailed Dave

**Dave is a fixer. He loves his clients and wants to make sure everything's just right for their QBRs – from the presentation slides to the backup data and even the temperature in the room.**

Dave's more junior client contacts love working with him, but the more senior contacts can get frustrated as they don't see enough of the innovation and vision they expect from their supplier. Dave is a super safe pair of hands but he needs to focus on turning safe into super.



### Likes

- Service reports and data
- Solving problems
- **Happy customers**



### Dislikes

- Bringing **new people** into the room
- Sales and selling
- Innovation he doesn't understand



## How could Dave improve his **QBRs**?

**1**

Lead QBRs with innovation, before focusing on BAU

**2**

Get colleagues involved

**3**

Ask for feedback from clients



# Last-Minute Mary

**Mary is a trusted account manager with a strong personality and great people skills. She's also a brilliant performer and can waltz into any QBR and shine immediately.**

Mary's great at bringing ideas to life – but she doesn't enjoy focusing on the finer details and always wants to move on to the next topic. As she tends to juggle too many balls at once, she usually starts preparing for reviews at the last minute and doesn't always get round to following up on ideas or getting things done, which is frustrating for both her clients and colleagues. To succeed, Mary needs to be surrounded by a top team.



## Likes

- Selling in **new concepts**
- Bringing ideas to life
- Building strong networks and relationships



## Dislikes

- Detail
- Reviewing service data
- Following up on actions from reviews



## How could Mary improve her **QBR**s?

1

Review data in advance of the QBR to ensure it's all correct

2

Make sure all relevant parties receive a copy of the follow-up actions

3

Ensure all actions are closed properly



# Independent Ian

**Ian always gets on with the job. His clients have confidence in his abilities and know he will deliver detailed, thorough QBRs on time.**

Ian is a hard worker and a trusted pair of hands, and everyone knows he always puts the client first. However, sometimes problems arise because he hasn't involved his colleagues and senior client contacts in the process – he's kept too much to himself, which can make escalations painful, especially during the review process. Ultimately, Ian will always do a good job, but if he was a little more collaborative and kept the wider team informed about what he's up to on a day-to-day basis, he could go from good to great!



## Likes

- His **customers**
- Being in control
- Service data



## Dislikes

- Management questions
- Escalating issues
- Asking for **feedback**



## How could Ian improve his **QBRs**?

**1**

Get leadership involved during the QBR process – both supplier and client-side

**2**

Share innovation with the rest of the team in advance of reviews, and ask for additional input

**3**

Ask for feedback from clients



# Collaborative Clive

**Clive wants everyone on his team to win. He believes you get results if everyone's on the same page from the get-go, so makes sure all the key people attend each QBR – both from his company and his client's. He loves a review full of attendees!**

Clive is the go-to person for entertaining clients and will do whatever he can to make sure they're enjoying the process – he's full of passion and genuinely cares about the relationship. However, this means he tends to lose sight of the bigger picture. He needs help understanding what the problems are, what his clients actually want, and how to get it for them.



## Likes

- Teamwork
- Workshops
- Planning



## Dislikes

- Not being 'in the know'
- Sales targets
- Problems



## How could Clive improve his QBRs?

1

Spend time understanding what the customer really wants/needs

2

Get leaders on both sides properly talking, to establish KPIs and objectives

3

Get clarity on post-review next steps, measure what needs to be done to achieve the desired outcome

# Deliver better QBRs every time

Do you want to deliver clear and consistent business reviews, every time, no matter which type of Account Manager is in charge of the process?

Clientshare Pulse is the business review workflow tool that lets you keep your finger on the pulse of all your accounts. Business reviews are tracked and recorded over time, so you can see the health of each account at a glance, address challenges before they become bigger problems, and ensure customers always see the best side of your business.

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