



## Mastering Technical Sales

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*John Care, Managing Director*

## Who Owns The Account?

### Why The SE Is More Than A Technical Resource

Walk into any Quarterly Sales Review meeting and ask “who owns the account?” The instinctive response from practically everyone in the room is “the account executive”. So here are some controversial thoughts – A) Is that really the case? B) Is that the best way to operate for the company and C) What is the SE’s role in account ownership?

Over the past thirty years I’ve worked at, and I’ve worked with organizations whose definition of ownership varied dramatically. They range from one of my last corporate jobs where the Account Director was a demi-god on a pedestal and everyone was a mere sales tool to a true team-based selling approach. In almost every situation the team-based approach led to better growth, better retention and more satisfied customers.

I’m going to make the case that the salesperson does NOT “own” the account in the traditional sense of the word. Instead they have primary responsibility for the account and the rest of the sales team (SEs, management, services, partners) has secondary responsibility. Think of it as the rep being the 51% majority shareholder and everyone else holds the remainder. It’s more than just playing with words and definitions, so let’s set the scene with an example from a Harvard Business Review blog<sup>i</sup> from a few years ago and then examine two reasons for exclusive rep ownership and a host of reasons why the company owns the relationship.

### *Who Owns Your Customer Relationships: Your Salespeople or Your Company?*

Your R&D group develops a unique new product. Manufacturing produces it. Finance puts the systems in place to track the money coming in. Marketing designs the promotional campaign. Your sales force is ready to execute. “We own the relationships with customers,” say your salespeople. “The company holds us accountable for revenues and expects us to develop and maintain the connections to drive sales. Just pay us our commissions and leave us alone.”

### *Item #1: The Single Point Of Contact*

An old management consulting adage is that “*the only thing worse than no-one in charge is multiple people in charge.*” Totally agree – as long as it is executed the right way. Demanding that all customer contact be routed through the rep, or that the rep sets all strategy in a trickle down command-and-control type model is both ineffective and inefficient.

Consider that most reps believe one of their primary roles is getting the deal through the pipeline to closure as fast as possible (not always true, but we’ll go with that for now). Having the rep “approve” every email and be present at every customer meeting and listen in to every

phone call is an inefficient bottleneck, and shows an amazing lack of trust in the rest of the team. More on this later.

### *Reason #2: My Job Is At Risk*

When a salesrep underperforms for a certain period of time they will be fired. Most SE's have never lived through the anguish of missing your personal number. I have and it is not a pleasant experience as reps are measured almost exclusively on revenue. SE's don't get fired for poor performance. Wait .. yes they do, but not as quickly. Every senior SE leader has terminated or transferred dozens of their staff. If an underperforming unit is shut down then SE's are more at risk than reps because of their specific technology focus. Large companies like HP and SAP are quietly merging units and closing sales silos. HP just announced another 15,000 additional job cuts. Smaller SMB (Small Medium Business) focused companies have stretched into the large enterprise space, hired teams, and then folded those teams as success eludes them.

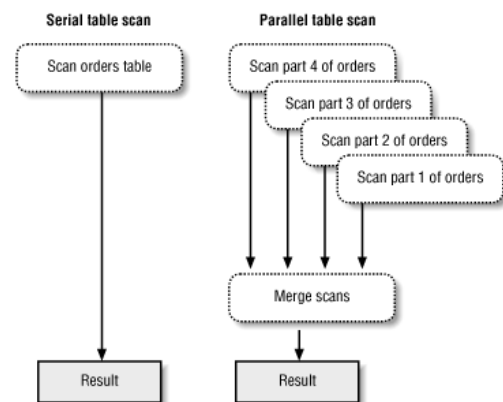
So yes – reps are more rapidly at risk – yet it is not a binary rep only decision. We are fortunate that there is a world shortage of both SE's and enterprise-ready salespeople right now! It was a different world back on 2008-09.

### **The Counter-Points**

Here are some great reasons why the company owns the relationship, and not exclusively the rep. Note that I am not promoting that that the SE or Services or Partners own the account, just that it be a shared responsibility and providing some ideas as to how the SE team gets more engaged.

### *Reason #1: It's More Efficient!*

Embrace a team-oriented approach by building a joint strategy and then let loose the team to execute on that strategy. In my career I have seen thousands of deals get closed because of a smart idea from the SE or Services. (I've also seen and heard thousands of pretty dumb ideas too.) By agreeing on tasks for everyone and an overall strategy you can reduce the number of multi-headed, many-legged sales calls by allowing the team members to work in perfect parallel instead of stuttering serial fashion. It will speed deals up! Think of the technical equivalent which is parallel processing and multi-core chips!



### *Reason #2: More Eyes On The Deal*

All stakeholders should be present at the monthly or quarterly account reviews. They need to be more than present and consuming oxygen, they should contribute and be accountable for their part of the deal, action items and resulting strategy. Note that contribute is a key word –

you can't just sit quietly and observe. As a non-SE related note, I always found that having someone from legal or sales ops at quarterly reviews helped deals go faster in the closing phases. It's that shared responsibility thing again and promotes teamwork between the salesrep, the SE and their management chain.

### *Reason #3: Open Up The Forecast*

Best of class sales leaders allow their presales and services staff to participate in their regular sales forecast reviews. Why? It makes the forecast more accurate by (a) preventing *sandbagging* (hiding deals that are going to close) and also preventing *happy ears* (forecasting deals that will not close). That implies trust between the rep and the SE working on the transaction. (Many SE organizations run parallel forecasts for resource tracking and prioritization purposes. Great internal tool, but when mixed with the official SFA sales forecast can cause explosive results. Be careful!)

### *Reason #4: Use A True Single Point Of Contact*

A large corporation such as Telstra, HSBC, Glaxo or CitiBank doesn't want a single point of contact <now abbreviated to SPOC> with your company. They want a SPOC either by need (like support, licensing, education or technical data), or by person (network engineer, IT manager, business user, CxO). Make it easy for the customer to do business with you – as long as everyone has the overall strategy. The classic sales model is to align contacts by title. So the CxO is matched to a VP or above in your organization etc. Rethink that, and base the match on value the customer receives from that person rather than the title and status. As a former CIO I didn't really care who my "executive contact" at a major vendor was – all I cared about was could that person help me and give me what I needed? In some cases the Regional Sales VP or Director Of Product Management was an empty waste of time and it was faster to go through the local sales team.

### *Reason #5: Spread The Knowledge*

When a classic "*I am 100% in control*" salesperson leaves the company, whoever picks up their accounts inherits a mess and starts almost from zero. That's a dangerous situation for any sales force. There may be a few other people in your company who have met the client once or twice – and that's it. You have to restart the relationship build all over again as there is no continuity. By spreading transaction strategy and execution (i.e. ownership) over multiple parallel coordinated fronts you spread the account knowledge. Because no CRM system is perfect!

Add to that the fact that average SE tenure at technology companies is usually more than twice that of sales (and services is about 1.7x that of sales) and a lot of the tribal knowledge can be distributed by the technicians, who are usually more team oriented than individual salespeople and are willing to share.



### *Reason #6: What Can I Do?*

We often hear “I’m just a single SE in a large team, what can I do?” The answer is to stop accepting the fact that you blindly do what the salesperson tells you to do. Sales teams are being asked to embrace the Challenger Sales model, conduct Solution Selling and listen to their Customers. You need to *challenger sell and solution sell* your capabilities and those of your team inside your company. **Instead of waiting for instructions, come prepared with ideas.**

### **Summary**

Where to start? This is a great opportunity for the SE team to reassert themselves back into the customer relationship and break away from being just a technical resource. Ask to participate in account reviews, account strategy, forecast calls and volunteer to make some solo calls if you don’t already. When a rep wants to cancel a scheduled technical call because they have a conflict, offer to make the call anyway, by yourself, because the deal will go faster. Just don’t mess it up!

Seek out a receptive salesperson or first line sales manager who is looking for help, an account executive who is struggling to make their number, or a wildly successful salesperson who owes you some favours. Sell your value and get engaged. Don’t fight about who owns the account, assume that you own a small piece of it.

**Ownership: “Nobody ever washes a rental car!”**

- ***Dr. Scott Simmerman***

Talking Points is a monthly column authored by John Care, Managing Director of Mastering Technical Sales. For more information on this and other Sales Engineering topics visit the website at [www.masteringtechnicalsales.com](http://www.masteringtechnicalsales.com).

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<sup>i</sup> <http://blogs.hbr.org/2011/12/who-owns-your-customer-relatio/> Zoltners, Sinha and Lorimer. 12-21-2011.