

KAM Maturity Model

PROGRAM AREAS	STAGE 1 AD HOC	STAGE 2 AWARENESS	STAGE 3 REPEATABLE	STAGE 4 PREDICTABLE	STAGE 5 ACTIVATING
PROCESS	Ad hoc or non-existent	Documented but not always followed consistently	Repeatable, and easy to bring new team members up to speed	Adaptable to changing conditions and circumstances	Dynamic, reviewed and improved frequently with continuous input across entire customer journey
TEAM BEHAVIOR	Scattered, roles are not clear	Each involved department is internally-focused, silos	Customer-aware, little collaboration	Customer-centric, clear roles, cross-functional teams	Partnering with customer and all parts of the business to create win-win outcomes
COMMUNICATION (INTERNAL)	Piecemeal and staggered communication approach, phone & email	Inconsistent notes or history of records	Documented and consistent with client notes shared as needed	On-demand and shared view of client information	Relevant and timely information is pushed to team members when needed
COMMUNICATION (EXTERNAL)	Sporadic mix of emails, calls, and meetings; few with clear agendas	Formal meetings happen sometimes with some customers, but follow-ups are not tracked consistently	Consistent QBRs for at least top 20% of accounts, conversations and commitments are documented	Formalized meetings cadence includes QBRs for top accounts and tactical sessions for small customers	Blend of strategic and tactical meetings through the year, with clear agendas and follow up
ACCOUNT PLANS	No account plan structure	Internally-focused plans and pipeline	Bullet-points of account information, without actionable steps	Strategic and coordinated among multiple teams	Living & breathing; adaptive and regularly reviewed to meet new and changing goals
FREQUENCY OF REVIEWS	Never	Inconsistent	Quarterly	Monthly	Constant learning and collaborating
TRAINING	No existing training and coaching practices	Training and coaching focus primarily on growth via sales and product-based training	Formal KAM/SAM programs are in place for training, coaching, and education	Voice of Customer techniques are an integral part of proactive learning and account growth	Training is based on desired outcomes
TECHNOLOGY	PPT, Excel	CRM	A KAM platform with limited technical capacity for in-depth analysis	Dedicated KAM platform integrated with other business applications	Complete 360-degree view of the goals and needs of your company and key accounts
LEADERSHIP MINDSET	MBOs & KPIs are the main metrics for growth	Growth is primarily centered on new business	Customer retention is a driver of valuation	Customer-centricity is a core company value	The customer is a strategic stakeholder in KAM processes, goals, and systems
CUSTOMER EXPERIENCE	Frustrating feedback from customers, poor service, low reported NPS	Inconsistent service, customers find workarounds to get service	Consistent experience, customer service and feedback are generally positive	Collaborative, customer is seeing benefits and develops closer relationship	Win-win client and team dynamic, co-creating value together with deep and meaningful collaboration
KEY MILESTONE TO LEVEL UP	Commitment to change the status quo	Investment in a dedicated infrastructure for post-sales team	Recognition that customer-centricity is a true competitive advantage	Willingness to put the customer at the center of everything we do	Proactive review of the maturity stages with its application to teams, business units, and the organization