SALES, KEY/STRATEGIC, AND GLOBAL ACCOUNT MANAGEMENT
B7650.001

Fall 2018
Friday/Saturday
Office Hours: By appointment

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COURSE DESCRIPTION

Earning sales revenues is critical to firm survival, growth, and enhancing shareholder value. Personal communication via some form of sales effort is the major way for many firms to persuade customers to purchase their products/services, especially in B2B markets. This course is designed to provide students with key considerations in managing these efforts.

Sales, Key/Strategic, and Global Account Management commences by focusing on traditional sales management issues. Then we transition into key/strategic account management with a largely domestic focus, before morphing into managing global accounts.

Without doubt, what we consider as traditional sales management is under significant pressure from environmental change; indeed, many salesforces are undergoing significant transformations. We place significant attention on the role of the front-line sales manager, then move to discuss the responsibilities of sales leaders and senior sales managers. As we transition into key/strategic account management, we commence by identifying the firm’s current-and-future critical customer assets, then put in place strategy, organization, human resources, systems and processes, designed to increase revenues and profits through enhanced customer loyalty. Key/strategic accounts are critically important for the firm’s future; hence, they are worthy of top management concern.

For many years, key/strategic account management was confined within national boundaries or, at most, within a few geographically contiguous countries. Today, globalization is impacting many areas of management practice. In particular, as customer firms increasingly request global contracts and require consistent global servicing, many suppliers are developing global account management programs, and

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1 The terms strategic account (U.S.) and key account (Europe, Asia) are interchangeable.
appointing global account managers (GAMs). In this course, we address strategic account programs at national, regional (multi-country), and global levels.

**RELATIONSHIP TO THE CORE CURRICULUM**

This course follows directly from the Marketing core course-- B7601, B5601, B6601. In core marketing, students learn about the centrality of customers to the future of the firm. B7650 extends the ideas developed in those courses by focusing on the promotional element of the marketing mix (4Ps), specifically on managing personal persuasion efforts to attract, retain, and grow customers.

**LEARNING METHODS**

This course focuses on critical issues in leading, directing, and managing selling and account management functions in contemporary corporations. We approach this task by using several pedagogic devices:

- **Lecture/discussion** by/with instructor
- **Case studies**. We examine sales/account management situations to address important decision-making issues. We employ traditional *long* cases requiring pre-class preparation, but also short cases that can be read and discussed in class.
- **Flipped classroom**. Some course material is available in video-book form. Students watch the video before class, then come to class prepared to engage in class discussion.
- **Course project**. Students select a topic of interest for deep study under the instructor’s supervision.
- **Visiting Speakers**. Experts in the field make presentations and discuss critical issues in their field of expertise.

Note: EMBA students have many pressures on their time. Demands of work, family, and EMBA classes are sometimes overwhelming. Regardless, our visitors have agreed to spend their valuable time with us, sometimes traveling long distances to speak at Columbia. Attendance at class is always important, but please respect our visitors by attending their presentations. (In accord with administrative guidance, the TA will circulate an attendance sheet for each class session.) Typically, we shall take a 10-minute break midway through class.

**Course Project**

The major course assignment is a presentation AND write up of your analysis and recommendations for a real-life, sales, key/strategic, or global account management situation. You identify a focal organization and critical issues. Your job is to clarify the problem, identify and analyze the various factors impinging upon the problem, develop a small set of options (together with pros and cons for each option), make a recommendation, and lay out an implementation plan. You work in small teams (maximum three members). There are two deliverables:
Term paper. This paper encapsulates your project; it may be delivered as a Word/pdf document, OR as a rich PowerPoint file.

Presentation. Made to the class to enhance student learning (posted on Canvas prior to class presentation).

Note: If you select rich PowerPoint for the term paper, your PowerPoint presentation may be a subset of this document. You are encouraged to invite organizational representatives to your class presentation. The course concludes with a short take-home final examination.

Course Materials
Course materials comprise selected printed books, video book, and cases. Note: most cases are in Book 3 (below); a few cases are posted on Canvas for the specific class session for which they are required. Follow-on cases that are part of a case series will be handed out in class:

Required books for the course are:

3. Capon, Noel and Christoph Senn, Cases in Managing Key, Strategic, and Global Customers, Bronxville, NY: Wessex, 2012. isbn 978-0-9833300-6-6

EMBA students receive a coupon code to secure access to Managing Global Accounts Video Book, available at www.wessexlearning.com. All printed books are at both www.wessexlearning.com and www.amazon.com. Required books 1,2,3,4,6 are also available from www.wessexlearning.com as pdf e-books, and on iTunes. Students should plan on reading required books 1,2,6 early in the semester.

Grading
Grades are assigned as follows:

- Class participation (individual) 30%
- Quizzes 10%
- Term Paper (group) 40%
- Final examination (take-home) 20%
| Class 1 | **Topic:** Course introduction  
Warren 416  
Marketing Fundamentals (review)  
**Case Discussion:**  
Bowen Industries (A) |
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| **Class 2** | **Visiting Speaker:** Gary Tubridy, Senior Vice President, The Alexander Group  
Friday September 21 – 1  
**Case Discussion:**  
*Challenges and Opportunities in Sales management*  
Bowen Industries (B) – distributed by instructor |
| **Class 3** | **Case Discussion:**  
Bowen Industries (C) -- distributed by instructor  
Bowen Industries (D) – distributed by instructor  
Bowen Industries (E) – distributed by instructor  
**Topic:**  
The Front-Line Sales Manager |
| **Class 4** | **Topic:**  
The Front-Line Sales Manager (concluded)  
**Small-Group Discussions**  
Celebrating Sales Management Success (small groups -- document on Canvas) |
| **Class 5** | **Topic:**  
Challenges for Sales Leaders and Senior Sales Managers  
Celebrating Sales Management Success (small group presentations)  
**Quiz 1** |
| **Class 6** | **Visiting Speaker:** Emily Crawford, Cisco (EMBA alumna)  
Friday October 26 --3  
**Topic:**  
Salesforce Leadership  
**Case Discussion:**  
Hausser Food Products, Inc. **Top**ic: |
| **Class 7** | **Visiting Speaker:** Howard Richman, Procurement Director, Citrix.  
Friday November 2– 1  
**Case Discussion:** |
Transforming Procurement at Merck: Beyond Purchase (Warren breakouts)

Class 8
Friday November 16 – 3
Warren 207
Case Discussion:
Premium Technologies

Topic:
Making the case for Key/Strategic Account Management

Term Project:
Individual groups meet with instructor

Class 9
Saturday November 17 – 2
Warren 415
*Visiting speaker: Gus Maikish, IBM (rtd.) Managing Director, Citicorp
Success in Managing Key/Strategic and Global Accounts

Case Discussion
Assorted short cases (book 3 – bring to class

Quiz 2

Class 10
Friday November 30 – 1
Warren 207
Topic:
Managing Key/Strategic and Global Accounts

Student Group Presentations
- Developing a Robust Framework for Customer Value
- Strategy for the Strategic Account Program
- Strategy for the Strategic Account
- Planning for the Strategic Account

Class 11
Saturday December 1 -- 2
Warren 415
Visiting Speaker: Mark Heil, Regional Account Director, Cisco
Organizing for Managing Global Accounts

Ask the Professor

Class 12
Saturday December 8 – 3
Warren 207
Topic:
Student Term Project Presentations

End of Course

Class Time Codes
1 =  8.30 a.m. to 11.30 a.m.
2 = 12.30 p.m. to  3.30 p.m.
3 =  3.45 p.m. to  6.45 p.m.