CREATING AN ACCOUNT MANAGEMENT PLAYBOOK & LEADERSHIP TRAINING
Building trusted client relationships for a global contractor enterprise.

Sir Robert McAlpine (SRM) is the c.20th largest contractor in the UK but find themselves competing with the top 5 in most bids, with annual turnover of c.£850m in Oct 2017 from about 90-100 customers. They're known for delivering large, complex engineering projects, focussing on seven main industry sub-sectors. The business has created a more diverse and resilient business model, increasing public sector revenue to 25% of secured turnover for 2017/18 and 44% for 2018/19. They have targeted public and private sector frameworks, generating 20% of current revenues and visible pipelines. They have a selective approach to winning work, including a bid/no bid gateway, and have identified and created a number of discrete sales processes.

THE RESULTS

o A co-created consistent approach that the business could take true ownership of with **support from senior leadership.**

o An increased focus on identifying and working with customers **whose values align** with Sir Robert McAlpine and with whom **mutual value has been realised**.

o Increased collaboration where client's cross business unit domains, lead to **an increase in repeat business** including a **broader range of services**.

o Deeper and **more resilient relationships** within managed client accounts.

o **Greater employee recognition** of the role they play in developing '**trusted client relationships**.'

WHAT DID THE CLIENT WANT TO ACHIEVE?

SRM needed to find an expert partner to co-develop an approach to Account Management that would be accepted across the company and, therefore, drive consistency in both planning and execution.

WHAT ISSUES WERE THEY FACING?

After some extensive restructuring in the company there was a strategic intent to improve the business approach towards customer selectivity and relationship management i.e., Account Management.

There were no formal, nor consistent approach to managing client relationships and accounts within SRM, including no dedicated resources. A number of 'key' customers were identified to have 'single point of failure' relationships.

There was lack of understanding of the definition of client account management, including the roles and responsibilities required throughout all departments of the organisation.

Client account management activities were not recognised as part of everyone's role.

SBR'S APPROACH

Key to the success of this objective was ensuring the support of senior leaders in the business whose customer and market base were quite diverse; 6 initial key customers and account teams were identified to develop plans, take part in relevant skills training and in the process develop a better understanding of their clients. The approach was then extended to further accounts.

The appointment and approach led to a number of positive outcomes, not least of all an overall improvement in customer focus throughout all stages of the project life cycle i.e., not just during construction. Having seen the benefits of an improved customer account approach, the business intends to foster the same approach with its supply chain.

Phase 1 - Creating and deploying a Sir Robert McAlpine Client Account Management playbook.

Phase 2 - Training with the Leadership and Client Account Management Teams.

> " *SBR Consulting got under the skin of SRM and helped focus our attention on the value of a unified approach to account management. They felt like a true partner (and a great cultural fit for us) in that they worked closely with us to co-create the essence of what we needed to achieve. The experience has left the company in a better shape and helped us to achieve our work winning goals in a very busy work environment.*
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> *I have stayed close to the team at SBR since our engagement and only have nice things to say about their approach and would strongly recommend them as a collaborative partner."*

Grant Findlay
Director of Business Development & Work Winning of Sir Robert McAlpine