

WHAT YOU WANT AND DON'T WANT IN YOUR ACCOUNT REPRESENTATIVE

There are reps and then there are reps; just make sure they have most of the characteristics found in the first list and few from the second one. This should provide you with a good sense of what you're getting compared to what you should.

SATISFACTORY ACCOUNT REPRESENTATION

These are desirable characteristics for account representation:

- 1) **Accessibility** – Answering the call. *If they answer the phone or return the call within 24 hours this is respectful behavior. Longer than that requires acknowledgment and an apology.*
- 2) **Escalation Chain** – Who's your boss? *You should know the next two levels up, their names, titles, and contact info. Having to use this info is a red flag; mitigating circumstances aside.*
- 3) **Ownership** – Your problem is my problem. *Seriously, this is the language that should be used, as well as a shared and equal sense of urgency.*
- 4) **Follow-up** – Can you hear me now? *Email and phone correspondence to reassure and provide you with status and updates should be a given.*
- 5) **Complete Answers** – Here's everything you should know. *You shouldn't be left guessing or lack the details, particularly material ones.*
- 6) **Proper Documentation** – Right forms for what needs to be done. *Paperwork should be made easy for you. The proper and latest form for signature should be provided with as much information filled in for you as possible. This can be a real time waster.*
- 7) **Flexibility** – I'll work around your situation. *Your rep should be able to work with your timetable, understand your issues, and be able to accommodate any surprises or at least be willing to try to.*
- 8) **Contextual Correspondence** – Understanding both sides. *Goes along with item 5 and provides the perspective necessary for you to appreciate the larger picture.*

9) **Advocacy** – I will go to bat for you. *A big one and most difficult to define, but you'll know it when you see it. This is someone who keeps asking the question until he or she gets the right answer for you. An 'I can do better for you' kind of mentality.*

10) **Poise** – I will be patient when you are not. *No matter how mad you get, this person listens and responds with a calm resolve – even if it's not what you want to hear.*

DISTRACTIONS, EXCUSES, AND DISCLAIMERS

These are undesirable characteristics of account representation:

- 1) **Accountability** – Taking attendance – but not necessarily there. *There is a difference for taking responsibility for mistakes and taking ownership of the problem. You want the latter more than former.*
- 2) **Metrics** – Who's doing the measuring? *Metrics are only relevant if they're yours. Satisfying SLA criteria is not the same as satisfying customers.*
- 3) **Stand-ins** – Uninvited guests with new agendas. *Be concerned if managers and other titles are hovering over your rep – it's a compensating action. Your rep should be able to stand on their own.*
- 4) **Explanations** – Blah, blah, blah. *Be wary of excessive and long explanations for issues. It should tell you there is more to the issue than is being offered.*
- 5) **Solutions** – Bait and switch, sow's ear. *A solution is only a solution when it fixes something. Be suspicious of the introduction of anything new unless it takes care of the immediate problem.*
- 6) **Delays** – Can I get that to you tomorrow? *Always set timeframes for fixes and avoid extending deadlines without serious discussion.*
- 7) **Blame** – It's their fault. *Reps who have a tendency to lay blame on others is probably not who you want to trust your job viability with.*
- 8) **Caveats** – Oh, by the way. *Late and missing details that have the potential to disrupt the status quo are generally not welcome.*
- 9) **Handling** – Getting you to shut up. *This is where you get the feeling something is missing; like results.*
- 10) **Fake Numbers** – Estimates that seem to change or are vague. *Be very careful of numbers that move around, especially for important issues. Estimates should remain in the ballpark and be carefully qualified.*

