A Quick Guide to Setting Up and Maintaining the High-Performance Cross-Functional Account Team

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Introduction

Cross functional teamworking is not new as many industries have been working in this fashion for many years. For industries like Engineering, setting up cross functional teams both within the organisation and with other organisations to work on major projects is now second nature. Just think about the aircraft manufacturing sector; companies like Airbus and Boeing rely on other companies to manufacture distinct parts of their aircraft and then bring all the relevant parts together at their assembly plants. This all requires expert project management capability together with the ability to work as high-performance cross-functional teams. Some industries though, who are relatively new to cross-functional team-working, are struggling to get out of the 'silo mindset'. One such industry which I have major experience of is the pharmaceutical industry and this industry can still operate very much in a 'silo mentality' and as such the setting up of high-performance account teams can be a real struggle. Whilst they bring various functions together to attempt to achieve the best promotion for their brands, many organisations struggle to get their cross-functional teams to operate effectively and as such they are not delivering on the full potential of their brands in key accounts.

In this short guide I would like to highlight ten effective and essential steps to ensure that your cross functional account teams can get off to the best possible start and ultimately achieve high-performance in terms of maximising the potential for your brands.

What exactly is a Pharma Industry Cross-functional Account Team?

This is a cross functional team which has been formed in order to maximise the potential of a brand or brands within a designated 'key account'. A key account has been identified as an account that is absolutely crucial to the business and one which necessitates the input of more than just a promotional account manager from the commercial arm. In order to 'service' the key customers within the account, then input is potentially needed from other functions including Market or Patient Access, Medical, Professional Relations and possibly even Learning & Development and Business Intelligence. Each of the personnel from these functions will have objectives and actions that they may have to carry out in order to deliver the Account Plan for that Key Account.

The following ten steps are the essential building blocks for a high-performance cross functional account team.

Step 1. Agree on Key Accounts.

Organisations will have their own criteria for how they classify an account and also on how they designate an account as 'key'. The important point here is that they can distinguish between those accounts that need a true cross-functional team behind them and those which may only need a commercial or promotional role to service them. Once the organisation has decided what accounts are 'key' and will need a full cross-functional team to service and develop them they can move to Step 2.

Step 2. Agree on the Specific Goals and Targets for the Account.

Before setting up the structure for the account team it is important to ensure that the key aims and goals for each key account are established and agreed. Once these are in place then the actual structure of the team in terms of the specific roles required can be put in place. Every account will be different but account goals will revolve around sales targets, market access goals, service and market development aims.

Step 3. Structure the Team as per the Needs and Goals for the Account

As highlighted above, the structure and composition of the account team will depend on what has to be achieved within the account in the short, medium, and long term. The overall strategic account plan will dictate specifically what roles are needed to deliver the plan. This may not be a 'one size fits all' approach where every key account team has the same composition in terms of functions and roles. It could be that some teams are composed of roles from sales, market access, medical, business intelligence and L&D whereas some teams (for example) may only have sales, medical and business intelligence. Organisations will need to be flexible and as such the days of set organisational organograms may be gone and organisational structures may well have to look very different from how they have appeared historically. Add in the 'new world' of digital and omnichannel engagement and the need for true high performance team development is very strong.

Step 4. Appoint an Account Team Manager or Leader

You could go two ways with this. Firstly, you could create a specific managerial role for each of the key account teams, or you could look at existing roles of the account team and appoint a 'team leader'. The former approach is very much a traditional approach with line management responsibility, with the second approach, more of a self-directed team approach where the team leader has no positional authority and where the team leader position could be rotated amongst the team roles after a set period of time. Whichever way is chosen, development of the team manager or leader should be a priority, as the role will be very different in many aspects from a traditional sales manager role. Learning & Development will play a key support role to not only the team manager or leader but also to the team as a whole. If there is no such internal capability then external coaching support should be secured.

Step 5. The Account Team agrees the Team Purpose, Aims, Goals & Targets.

Once you have your new account team structure agreed and all the relevant personnel in place, it is now time for the team to work on the essential high performance team basics and the processes and behaviours that underpin these. Without fully discussing and agreeing the basics, the team can be tempted to start delivering the account plan and this can result (more often than not!) in conflict, disruption, and a dip in performance, with morale and motivation being severely impacted upon.

Before the team moves on it is vital that the account team agrees its purpose and once again ensures that everyone fully understands the specific aims, goals and objectives that have to be achieved.

Step 6. All Team Roles and Responsibilities are 100% understood and agreed.

Historically one the big challenges that cross-functional teams in pharma have experienced is that of the various 'function' roles simply coming into the team as 'representatives' of their function and as such they have their 'function blinkers' on. This can result in a lack of 'buy-in' to what the cross-functional team is there to achieve and with many 'functional reps' having no measurement of performance in terms of their cross-functional team membership then their 'heart' is not really with the account team, and as a result their 'heart' stays solely with their 'function'. This has to change if everyone in the team is to be fully engaged emotionally and physically in doing their best for the account team. Everybody has to fully know their role and its associated responsibilities along with the specific objectives that they have to achieve, and the actions that they commit to undertake to play their part in the account plan. It's also vital that everybody in the team is aware of everyone else's roles and objectives so that they can support their teammates where needed.

Step 7. The Account Team builds a Team Development Plan and agrees a Team 'Contract' or 'Charter'.

Most organisations will ensure that all of their employees have a personal development plan but very little attention, if any, is focused on teams having their own team development plan. This is due to the fact that this is simply not normal practice and as such there is a lack of understanding of how

to create one. The starting point for any team development is to look at benchmarking the team against a high-performance team framework (e.g., PARTNERS™). Going through this benchmarking process will identify key areas of process (and possibly behaviours) that need to be developed if the team is to go up the performance curve to high performance. It also may be the case that there are capability and knowledge gaps that affect every member of the team (e.g., customer account environments etc) and as such as this is a 'whole team' 'gap' then this can be included in the team development plan. It is important that an allocated team member takes responsibility for leading the plan.

It is vital that every team member also gets the opportunity to highlight what they personally need to see and experience in the team in terms of team members' behaviours and attitudes. The team should discuss and highlight what the desired positive behaviours and attitudes they need to see displayed and demonstrated in a confident, competent, and consistent fashion. These can then be recorded formally in a team 'contract' or 'charter' which can then be used as a framework for guiding the team to high performance. The 'contract' or 'charter' can also be used as a 'feedback framework' in order to sense-check how closely the team members are adhering to the 'contract.' Similarly, an open discussion should take place around the 'expectations' of the team members particularly in relation to leadership. What does the team manager or leader expect from the team? And as importantly, what do the team members expect from their team manager or team leader? These are important and vital conversations that many teams do not put in place. Having these conversations really starts to build the levels of trust, an essential and vital component of high-performance teams.

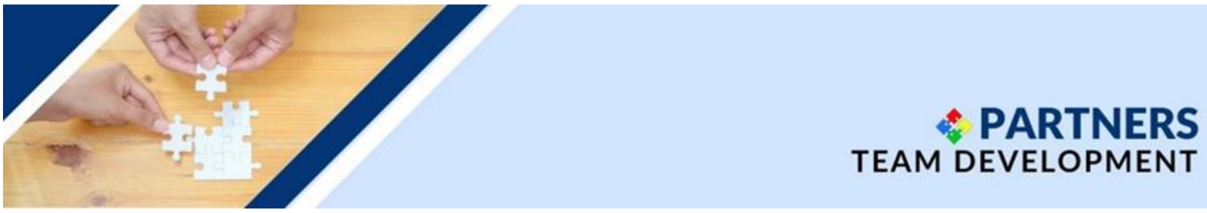
Step 8. The Account Team agrees Team and Individual Reward and Recognition Processes

Cross-functional teams have suffered in the past due to a reliance on company-wide reward and recognition schemes. Many of these schemes have been poorly understood and have been focused purely on individual performance reward. In most cases many cross-functional team members do not have a measure on how the actual team performs against its aims, goals, and objectives, this measure sitting solely with the team manager or leader. With no team member measurement against the team goals then in reality you do not have a team. Great care should be taken to ensure that any reward and recognition schemes reward both individual performance and team performance. This will potentially also mean that the team members will need to be trained in self-directed peer appraisal especially when team contributions have to be assessed and rewarded.

Step 9. The Account Team agrees a formal Review Process.

Teams are usually pretty good at putting dates in the diary for regular team meetings but most of these meetings will be focused on the tasks and actions needed to progress the account plan. Time needs to be taken out and 'ring-fenced' to ensure review of three key areas:

a. Performance against the account plan aims, goals, targets, and objectives.
b. Progress of the Account Team Development Plan
c. Review of the application of, and adherence to, the Team Contract or Charter.



Step 10. The Account Team identifies its key Stakeholders and creates a Stakeholder Engagement Plan

Every team needs support from out-with the actual team. Pharmaceutical account teams are no different and as such the account team should identify who their key stakeholders are and have an engagement plan that ensures maximum support for the account team in the pursuit of their goals. A key stakeholder is a person of ‘influence’ who can lend support to the team and whose actions can impact either positively or negatively on the team’s progress. It is important to identify who these stakeholders are and have an engagement plan that allows the team members to engage with these stakeholders actively and positively in order that the account team’s ‘brand’ or ‘profile’ is enhanced.

Hopefully, this quick guide will allow account teams to form quickly and efficiently in order to make their path to high-performance that bit easier.

More information on Teamwork and Key Account Management can be gained from the following link: Resources | Partners Team Development If you require more information on setting up Team Development Plans and Team Contracts then contact me via the details below:

Yours Aye,

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10 Steps to Building a High Performance Key Account Team