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# **HOW TO GET IN FRONT OF THE C-SUITE & GET RESULTS WORKBOOK**

Prepared by Warwick Brown

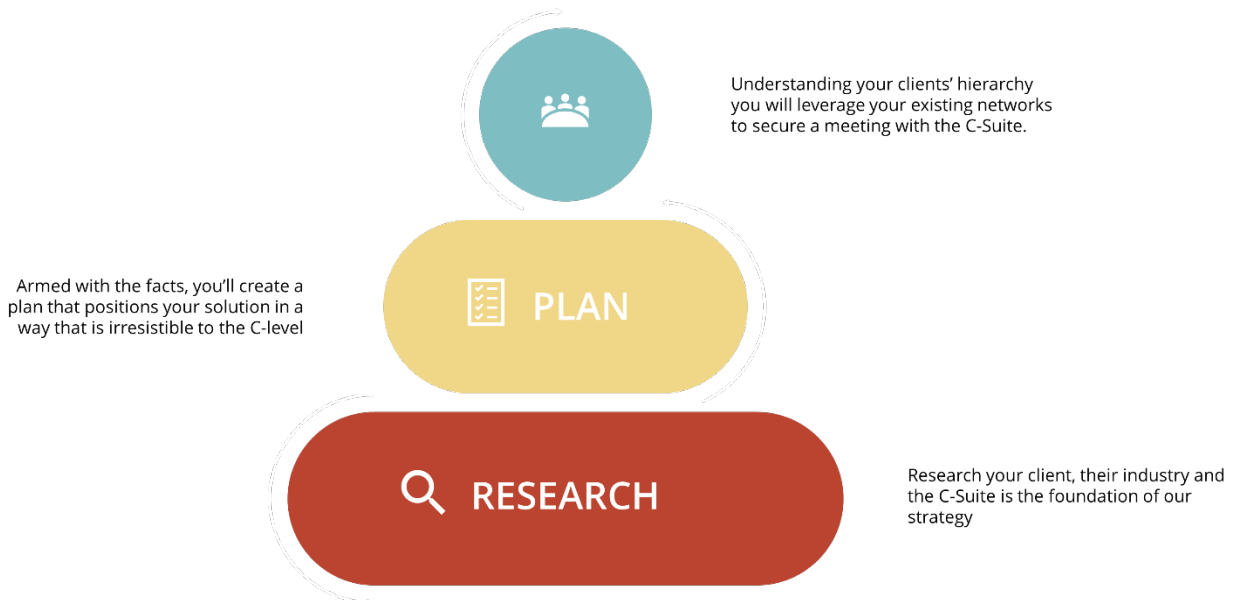


## Why the C-Suite?

- Once a supplier is appointed the C-Suite delegate to their direct reports to manage the relationship.
- If you're an Account Manager looking after an existing client – you're most likely dealing with a single point of contact. It might be a category manager and procurement director, someone from finance, HR or an office manager or admin.
- Opportunities to engage and connect with the C-Suite will not come your way unless you make them happen.
- A relationship with the C-suite signals to the rest of your client that who you are and what you do is important.
- The C-Suite have influence and they make decisions
- A strong relationship will improve your client retention and maximise revenue generation opportunities.

## The RPM Method

Research. Plan. Meet



As you go through the workshop I'd like you to think about one client in particular you want to connect with and expand your relationships with senior stakeholders.

I'd suggest:

- Your largest client because you want to make sure you keep them
- A client who is unhappy and you want to make sure you keep them
- A client who has a contract expiring within the next 12 months and you want to present a new offer to avoid a bid
- A client you have neglected or who you really don't know because it's been a case of no news is good news, but you have no idea if you're luck is about to run out (let's face it we all have those)

## Research

### Who are your clients' C-level executives?

Do you know? It's time to find out.

#### Action:

- Ask your main point of contact for a copy of their org chart. This will give you not only the C-Suite but their direct reports. This will be useful later when you want to leverage your networks to get a meeting.
- Your point of contact will ask why you want it. Be prepared with an answer for that question.
- Follow your clients' company page on LinkedIn
- Follow your clients' C-Suite on LinkedIn and any other important decision makers and influencers
- Review their profile on LinkedIn. Look for:
  - Common connections
  - Similar experience or background (maybe you once worked for the same company or did the same job)
  - What groups do they belong to – join them
  - What associations are they in – follow them
- Set up time in your diary to regularly engage with LinkedIn posts of the C-Suite and company you're targeting.
- Leave thoughtful comments that contribute to the conversation. But don't over do it. Be authentic. Engage and interact on the stories that interest you. Not every single one.
- Scroll through your target C-Suite's post activity.
  - Are they using LinkedIn?
  - Are they sharing content regularly?
  - Have they written any articles? What were they about and how might you draw conclusions that might be relevant to your own business and solution
  - Are there patterns or themes in the content that will give you some clues into what is important to them?
- Regularly summarise your observations on your clients' business and the people who you want to grow stronger relationships with. Things will change over time. Add these notes to your CRM.

### What does the C-Suite do?

Next step is to understand your solution and how it might appeal to the C-Suite.

Here's a list of some of the top jobs and I've included a list of 50+ C-level titles and explanations of what they do.

You're not going to build a relationship with each and every one. It will be very dependent on your solution and who makes the buying decisions.

#### Action:

- Take a look at the table of C-Suite titles and think about those that are relevant.

<b>Title</b>	<b>Abbreviation</b>	<b>Explanation</b>
<b>Chief Academic Officer</b>	CAO	Responsible for academic administration at universities and other higher education institutions.
<b>Chief Accounting Officer</b>	CAO	Responsible for overseeing all accounting and bookkeeping functions, ensuring that ledger accounts, financial statements, and cost control systems are operating effectively.
<b>Chief Administrative Officer</b>	CAO	Responsible for business administration, including daily operations and overall performance.
<b>Chief Artificial Intelligence Officer</b>	CAIO	Responsible for AI research department.
<b>Chief Analytics Officer</b>	CAO	Responsible for data analysis and interpretation.
<b>Chief Architect</b>	CA	Responsible for designing systems for high availability and scalability, specifically in technology companies. Often called enterprise architect (EA).
<b>Chief Audit Executive</b>	CAE	Responsible for the internal audit.
<b>Chief Business Officer</b>	CBO	Responsible for the administrative, financial, and operations management of the organization, often combining the roles of chief administrative officer (CAO), chief financial officer (CFO), and chief operating officer (COO).
<b>Chief Business Development Officer</b>	CBDO	Responsible for business development plans, design and implementation of processes to support business growth.
<b>Chief Brand Officer</b>	CBO	Responsible for a brand's image, experience, and promise, and propagating it throughout all aspects of the company, overseeing marketing, advertising, design, public relations and customer service departments.
<b>Chief Commercial Officer</b>	CCO	Responsible for commercial strategy and development.
<b>Chief Communications Officer</b>	CCO	Responsible for communications to employees, shareholders, media, bloggers, influencers, the press, the community, and the public. Practical application of communication studies.
<b>Chief Compliance Officer</b>	CCO	Responsible for overseeing and managing regulatory compliance.

<b>Title</b>	<b>Abbreviation</b>	<b>Explanation</b>
<b>Chief Content Officer</b>	CCO	Responsible for developing and commissioning content (media) for broadcasting channels and multimedia exploitation.
<b>Chief Creative Officer</b>	CCO	In one sense of the term, responsible for the overall look and feel of marketing, media, and branding. In another sense, similar to chief design officer.
<b>Chief Customer Officer</b>	CCO	Responsible for customer relationship management.
<b>Chief Development Officer</b>	CDO	Responsible for activities developing the business, usually through added products, added clients, markets or segments.
<b>Chief Data Officer</b>	CDO	Responsible for enterprise-wide governance and utilization of information and data as assets, via data processing, data analysis, data mining, information trading, and other means.
<b>Chief Design Officer</b>	CDO	Responsible for overseeing all design aspects of a company's products and services, including product design, graphic design, user experience design, industrial design, and package design, and possibly aspects of advertising, marketing, and engineering.
<b>Chief Digital Officer</b>	CDO	Responsible for adoption of digital technologies, digital consumer experiences, the process of digital transformation, and devising and executing social strategies.
<b>Chief Diversity Officer</b>	CDO	Responsible for diversity and inclusion, including diversity training and equal employment opportunity.
<b>Chief Engineering Officer</b>	CEngO	Similar to the more common chief technology officer (CTO); responsible for technology/product R & D and/or manufacturing issues in a technology company, oversees the development of technology being commercialized.

<b>Title</b>	<b>Abbreviation</b>	<b>Explanation</b>
<b>Chief Executive Officer</b>	CEO	Responsible for the overall vision and direction of an organization, making the final decisions over all of the corporation's operations. The highest-ranking management officer; often also the chairman of the board. Usually called CEO in the United States, chief executive or managing director in the United Kingdom, Commonwealth of Nations, and some other countries.
<b>Chief Experience Officer</b>	CXO	Responsible for user experience, overseeing user experience design and user interface design. "CXO" is not to be confused with "CxO", a term commonly used when referring to any one of various chief officers.
<b>Chief Financial Officer</b>	CFO	Responsible for all aspects of finances.
<b>Chief Gaming Officer</b>	CGO	Responsible for both the game development and the online/offline publishing functions of a company that makes video games.
<b>Chief Human Resources Officer</b>	CHRO	Responsible for all aspects of human resource management and industrial relations.
<b>Chief Information Officer</b>	CIO	Responsible for information technology (IT), particularly in IT companies or companies that rely heavily on an IT infrastructure.
<b>Chief Information Security Officer</b>	CISO	Responsible for information security.
<b>Chief Innovation Officer</b>	CINO	Responsible for innovation.
<b>Chief Investment Officer</b>	CIO	Responsible for investment and/or for the asset liability management (ALM) of typical large financial institutions such as insurers, banks and/or pension funds.
<b>Chief Information Technology Officer</b>	CITO	Responsible for information technology. Often equivalent to chief information officer (CIO) and, in a company that sells IT, chief technology officer (CTO).
<b>Chief Knowledge Officer</b>	CKO	Responsible for managing intellectual capital and knowledge management.
<b>Chief Legal Officer</b>	CLO	Responsible for overseeing and identifying legal issues in all departments and their interrelation, as well as corporate governance and business policy. Often called general counsel (GC) or chief counsel.
<b>Chief Learning Officer</b>	CLO	Responsible for learning and training.

<b>Title</b>	<b>Abbreviation</b>	<b>Explanation</b>
<b>Chief Marketing Officer</b>	CMO	Responsible for marketing; job may include sales management, product development, distribution channel management, marketing communications (including advertising and promotions), pricing, market research, and customer service.
<b>Chief Medical Officer</b>	CMO	Responsible for scientific and medical excellence, especially in pharmaceutical companies, health systems, hospitals, and integrated provider networks. The title is used in many countries for the senior government official who advises on matters of public health importance. In the latter sense compare also Chief Dental Officer (Canada) and Chief Dental Officer (England).
<b>Chief Networking Officer</b>	CNO	Responsible for social capital within the company and between the company and its partners.
<b>Chief Nursing Officer</b>	CNO	Responsible for nursing.
<b>Chief Operating Officer</b>	COO	Responsible for business operations, including operations management, operations research, and (when applicable) manufacturing operations; role is highly contingent and situational, changing from company to company and even from a CEO to their successor within the same company. Often called “director of operations” in the non-profit sector.
<b>Chief Privacy Officer</b>	CPO	Responsible for all the privacy of the data in an organization, including privacy policy enforcement.
<b>Chief Process Officer</b>	CPO	Responsible for business processes and applied process theory, defining rules, policies, and guidelines to ensure that the main objectives follow the company strategy as well as establishing control mechanisms.
<b>Chief Procurement Officer</b>	CPO	Responsible for procurement, sourcing goods and services and negotiating prices and contracts.

Title	Abbreviation	Explanation
<b>Chief Product Officer</b>	CPO	Responsible for all product-related matters. The Chief Product Officer (CPO) is to the business's product what the Chief Technology Officer is to technology. The responsibilities of the CPO are inclusive of product vision, product strategy, user experience, product design, product development, and product marketing.
<b>Chief Quality Officer</b>	CQO	Responsible for quality and quality assurance, setting up quality goals and ensuring that those goals continue to be met over time.
<b>Chief Research &amp; Development Officer</b>	CRDO	Responsible for research and development.
<b>Chief Research Officer</b>	CRO	Responsible for research.
<b>Chief Revenue Officer</b>	CRO	Responsible for measuring and maximizing revenue.
<b>Chief Risk Officer</b>	CRO	Responsible for risk management, ensuring that risk is avoided, controlled, accepted, or transferred and that opportunities are not missed. Sometimes called chief risk management officer (CRMO).
<b>Chief Sales Officer</b>	CSO	Responsible for sales.
<b>Chief Science Officer</b>	CSO	Responsible for science, usually applied science, including research and development and new technologies. Sometimes called chief scientist.
<b>Chief Security Officer</b>	CSO	Responsible for security, including physical security, network security, and many other kinds.
<b>Chief Strategy Officer</b>	CSO	Responsible for strategy, usually business strategy, including strategic planning and strategic management. Assists the chief executive officer with developing, communicating, executing, and sustaining strategy. Sometimes called chief strategic planning officer (CSPO).
<b>Chief Sustainability Officer</b>	CSO	Responsible for environmental/sustainability programs.



Title	Abbreviation	Explanation
<b>Chief Technology Officer</b>	CTO	Responsible for technology and research and development, overseeing the development of technology <i>to be commercialized</i> . (For an information technology company, the subject matter would be similar to the CIO's; however, the CTO's focus is technology for the firm <i>to sell</i> versus technology used for facilitating the firm's own operations.). Sometimes called chief technical officer.
<b>Chief Value Officer</b>	CVO	Ensure that all programs, actions, new products, services and investments create and capture customer value.
<b>Chief Visionary Officer</b>	CVO	Responsible for defining corporate vision, business strategy, and working plans.
<b>Chief Web Officer</b>	CWO	Responsible for the web presence of the company and usually for the entire online presence, including intranet and internet (web, mobile apps, other).

Source: Wikipedia

### Expand your research

Don't stop at LinkedIn. There's plenty of other places to learn about your client and their C-Suite

Action:

- Set up Google Alerts to get automatic emails when the person you are following is indexed.
- Read their company website
- Sign up to their company newsletters
- Read annual results, press releases and announcements.
- Listen to earnings calls
- Search YouTube for interviews
- Use a news aggregator service like [Nuzzel](#) (my favourite) that will put all your social media feeds into a daily summary.

### Keep informed

Here's a list of interesting and reputable magazines that share thought-provoking content that will help you learn about emerging business trends that are of interest to the C-Suite. Read these to stay informed and grow your understanding and credibility. You want to be seen as an expert if you want a shot at a sustainable relationship with the C-Suite.

- ✓ [Harvard Business Review](#)  
Find new ideas and classic advice on strategy, innovation and leadership, for global leaders from the world's best business and management experts.
- ✓ [The Economist](#)  
The Economist offers authoritative insight and opinion on international news, politics, business, finance, science, technology and the connections between them. They also have an audio version
- ✓ [Aeon](#)  
Aeon is a magazine of ideas and culture that publishes in-depth essays, incisive articles, and a mix of original and curated videos
- ✓ [Ars Technica](#)  
Serving the Technologist for more than a decade with IT news, reviews, and analysis.
- ✓ [The Exponential View](#)  
Weekly newsletter by Azeem Azhar exploring Exponential technologies, artificial intelligence (AI), self-driving cars, dominant platforms, business, the future.
- ✓ [CB Insights](#)  
Deep analysis of technology trends and forecasts based on extensive research and how it impacts business.
- ✓ [Abundance Insider](#)  
Weekly blog/newsletter from Peter Diamonds that highlights emerging technologies and explains why it's important to business
- ✓ [A National Newspaper](#)  
The Guardian, The Washington Post, New York Times etc. Sign up to receive daily emails with news headlines to your inbox. A simple way to stay informed on the political, economic, social and technology landscape in your country.

## Create the Plan

Ask yourself WHY? Why would the C-Suite want to see you? What are you going to help them achieve? What value can you bring?

The best way to answer this is to speak their language and look at KPI's that matter and frame them in one of three ways:

- **Cost avoidance** – for example your solution means they won't have to hire new staff – they can do more with the same resources
- **Cost reduction** – for example your solution means they can cut headcount – they can do the same (or more) with less resources

- **Generate revenue** – self-explanatory – your solution will help them make more money – new sales, improve gross margin etc.

**The metrics that matter**

Key Performance Indicators (KPI’s) are vital metrics that help decision makers see how well the organisation, business units, projects and individuals are performing in relation to their strategic goals and initiatives.

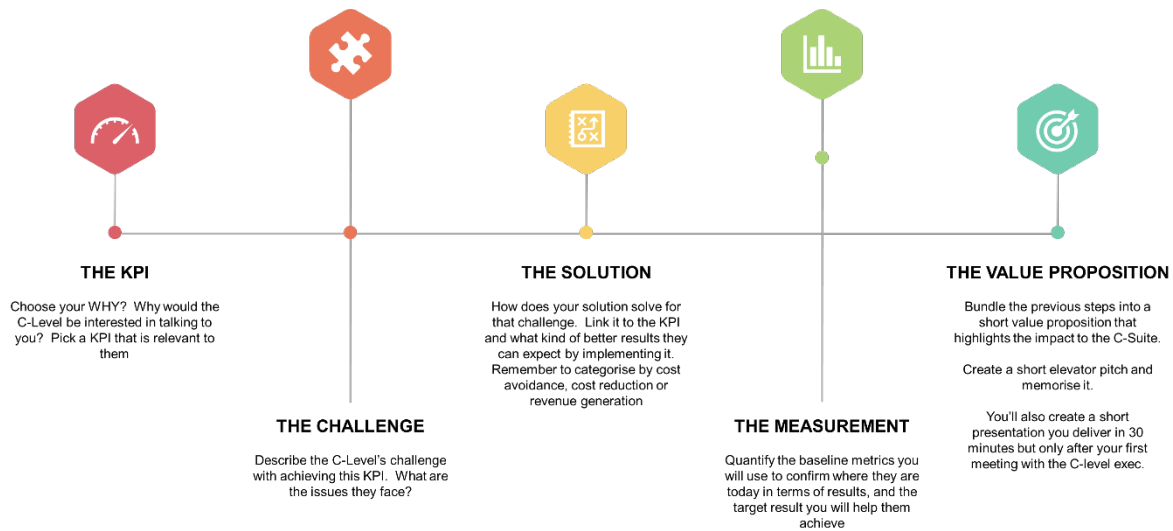
Which is WHY we start here.

Action:

- ☑ Review the [Bernard Marr Key Performance Library](#) and select some relevant KPI’s that make sense to your C-Level Exec and that your solution can solve for

**The Plan**

There are 5 steps to the planning framework



Action:

- ☑ Create a table like below with each of the steps. A few sentences for each

CLIENT					
C-LEVEL EXECUTIVE					
THE KPI	THE CHALLENGE	THE SOLUTION	BASELINE	TARGET	VALUE PROP
Choose a metric relevant to the C-level	Describe their current challenge with getting desired results	Describe how your solution can solve that challenge. Categorise the result (cost avoidance, cost reduction or revenue generation)	Quantify a value-based metric for where they are today. A guestimate will do for now.	Quantify a value-based metric for the results they can expect after your solution	Craft an elevator pitch that brings all of this together

## Test your theories

You've done your research, you've created your plan and you've built a value proposition and elevator pitch. Before you truly advance with your plan and secure that meeting run your plan past a few people for advice.

Check that your assumptions are correct and ask questions to learn more about the KPIs, the pain points, how your solution solves those and the metrics from which you'll measure your baseline and set targets. Fine tune as you get feedback.

You want to want to run this through some different people to make sure you have a finely tuned value proposition that really speaks to the challenges of the C-Level exec you want to connect with. It'll also give you three chances at a rehearsal to introduce your proposal to people who haven't heard it before. Don't take shortcuts here. This will make a HUGE difference to the end result both in terms of content and how you present it.

It may also prove not to be worth pursuing. Maybe you're barking up the wrong tree or the solution isn't as compelling as you thought. Refine your plan or if it really sucks, start over.

### Action:

- Grab a meeting with your boss to run through your plan for a second opinion.
- Run your pitch past someone within your own organisation who either is, or reports to, the C-level you're targeting. If you're a big organisation, then it may not be practical to get a meeting with your own CFO, but you could certainly grab time with a Director or VP of Finance who can give you some insights.
- Road test it with your main point of contact. Let them know you've been working on some opportunities that can really squeeze some extra juice from your solution and have a big impact and you'd like to get their valuable advice.

## The Meeting

### Leverage your networks

You're an account manager, so you have networks within your client's organisation. You need to leverage them.

I've read stats that say as many as 85% of Senior executives will likely accept a recommendation from someone inside the company so a referral is going to be the fast track to a meeting with the C-Suite.

It's likely you have a main point of contact. In an ideal world they will also be your sponsor and help you get in front of your target C-level executive.

### Why?

Because they can bask in your reflected glory. If your solution will make the C-Suite look good, your main point of contact will also look good for introducing you to them.

### Make it easy

If you want an introduction from your contacts, then you have to make it super simple for them to do so and S.P.E.L.L. it out.

Action:

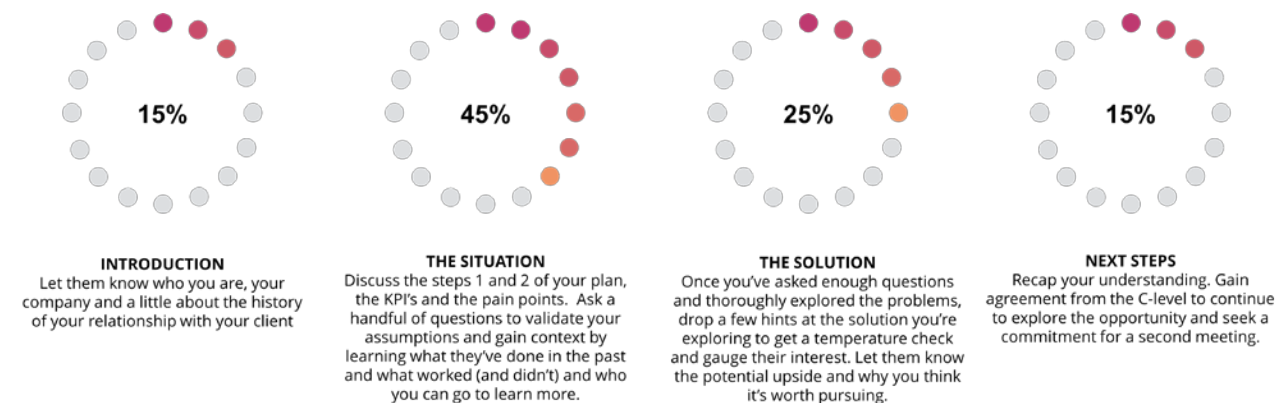
- ☑ Create a draft email for them to send on your behalf with some relevant attachments of your initial scope of the opportunity.
- ☑ Create a one-page slide, infographic, chart that can be embedded in an email.
- ☑ Volunteer to make send the email direct if they simply send a brief note to the C-level saying they've discussed an opportunity with you and asked you to reach out to them directly.
- ☑ Ask for 15 minutes to 30 minutes MAX. You'll frighten them off.
- ☑ Take advantage of any time you're in the building for other reasons. My quarterly reviews are often 90 minutes to 2 hours long. Frame your meeting more like a drop-in
- ☑ Pick up the phone and make a call. Leave a voicemail mentioning who you are, and that you recently met with your point of contact about an opportunity for your solution to have a positive impact on the KPI your targeting and would like to find some time to connect and discuss (remember the value proposition and elevator pitch?)

### The meeting

Here's how I suggest you split the time when you secure the meeting.

This is not a presentation. Your first meeting is about connecting, building rapport, exploring the opportunity, gaining permission to pursue it and securing a second meeting to follow up.

No PowerPoint. Just you, the C-Level and a pen and paper and if you can get one, a whiteboard.



*\* Adapted from a model by Dr. Steve Bistriz*

### Conclusion

What I've just shared with you is the exact system I use to connect and engage with C-level executives. To establish my authority and credibility and earn their respect as a trusted advisor. This has helped me more times than I can count. I hope it helps you too.