

THE CHALLENGES OF KEY ACCOUNT MANAGEMENT IMPLEMENTATION IN PROFESSIONAL SERVICE ORGANIZATIONS

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The purpose of this paper is to describe what kind of challenges there are for key account management system implementation in the specific context of professional service organization. Influencing factors are defined under three categories: what type of operational capabilities there should be to form a supportive organizational context for KAM implementation, what should be considered when the KAM system is set up and what kind of KAM organization would support KAM implementation. This article is based on an explorative, qualitative single-case study in a professional service organization implementing the KAM system for the first time.

Introduction

Identifying and maintaining strategic client relationships is an ever-salient point in professional service organizations. Maintaining those relationships requires special attention, and in many companies this is done by using key account management systems, which is an organized way to develop and conduct key relationships.

In this article, KAM system implementation is examined in the specific context of professional service organization. Even though the KAM system is nowadays widely used in the business sector, related studies are scarce and the discussion fragmented (Homburg, Workman & Jensen 2002). Thus, more profound conceptualization is needed. A context-bound approach may be especially beneficial, because KAM systems or their implementation in professional service organizations is a topical but unexplored area (Ojasalo 2002).

Key account management (KAM) implementation is a long-term and strategic process during which many far-reaching decisions are made (Kempeners & van der Hart 1999). Its main goal is to facilitate interactions with the customer and to improve the coordination of the relationship. This kind of

system may be especially beneficial in a professional service organization's strategic customer relationships because 1) it is important to capture knowledge and learn from the customers in order to be able to produce high-quality professional services, 2) trust between the buyer and the seller is a key component of a functioning relationship, and 3) nowadays, professional services are even outsourced when customers are focusing on their key competencies. In those situations special challenges of relationship coordination are faced.

There are also characteristics of the professional service itself that may justify KAM system implementation. The selling, development and realization of professional services takes place very intensively and in an integrated process with the customer. The services are often highly tailored to suit specific needs. Thus, the KAM system may offer a supportive structure for this type of service production. A considerable part of the job in professional service organizations involves common idea creation and brainstorming among experts, when there is a group of professionals conducting the same project for the customer. The KAM system may also provide a supportive structure for internal cooperation and knowledge transfer in the form of a cross-functional KAM team, for example

(see also Nätti *et al.* 2006). Considering these characteristics of the professional service, it is natural to see the KAM system as an effective tool to facilitate relationship coordination and customer-related interactions both internally and externally in the professional service organization.

Professional service organizations and key account management

Many organizations are trying to achieve a competitive advantage and stability by creating strategic relationships and alliances with their customers and suppliers, and key account management is one result of this development (Millman & Wilson 1995). Sellers acknowledge that better customer relationship coordination increases customer loyalty and customer retention, improving organizations' competitive advantage (Abratt & Kelly 2002). In many business-to-business contexts, serving fewer, larger customers is generally more profitable than selling to a larger amount of smaller customers (Boles, Johnston & Gardner 1999). Stevenson (1981) concludes that the key benefits of account management are increased share of buyer's purchases, increased sales and profits, and improved communication between buyer and seller.

Customer relationships are central especially in professional service organizations, whose relationships differ from other industries in terms of richer and deeper interaction between different parties (Dawson 2000). Knowledge, which is the most important resource in developing professional services, is mostly gained in customer interaction (Halinen 1997, 48) for which key account management may offer a facilitative structure.

Discussion around key account management systems can also be seen as a natural consequence of the current discussion of organizational customer-orientation. In that discussion we can see influences from different areas: industrial marketing, organizational buying behavior, sales management, procurement management, network and relationship marketing (see e.g. McDonald, Millman & Rogers 1997; Homburg *et al.* 2002). For example, Homburg *et al.* (2002) have conceptualized the research on KAM activities on three different levels depending on the focus: 1) key account managers, 2) dyadic relationships between the seller and key account and 3) KAM system planning in the organizations. Of these, the first one is related to sales management and the second one is closely related to relationship marketing discourse (see also Millman & Wilson 1995; Shapiro & Moriarty 1984). The third group is the most extensive one; however, it does not connect all these focal aspects of key account management together.

In this article we focus on KAM system in the professional service organization, especially on its implementation process. Our aim is to offer a holistic description. We base our presentation on empirically grounded categorization which examines the following three aspects of KAM implementation and its challenges in professional service organizations: the organization's operational capabilities needed in KAM implementation, organizing the KAM system and finally, KAM organization and its individuals.

Related to the three aspects mentioned, for example Ojasalo (2001) refers to the importance of the *development of operational-level capabilities* related to products and services, organizational structure, information exchange and individuals.

Millman and Wilson (1999) see that excellent products and advanced levels of technical and process knowledge as well as the ability to apply these to customer problems ensure an effective way of serving customers at the operational level. Knowledge transfer internally in the professional service organization is indeed seen as an important factor when implementing KAM. For example, Walter (1999) sees that one important relationship-specific coordination task is to search, filter, judge and store information related to customer's organization, strategies, goals, potentials and problems. In addition, related to the operational capabilities, Shapiro and Moriarty (1984b) talk about "support functions", referring to the physical production and delivery of goods, pricing and the marketing departments, for example.

Internal organizing of the KAM system is also a central theme in the implementation process of key account management. When implementing the KAM system, many decisions related to systems design and organizations have to be made (see e.g. Shapiro and Moriarty 1984a). It is suggested that a supplier's ability to respond to key accounts' needs can be improved by adjusting the organizational structure and developing special teams to take care of the accounts (also McDonald *et al.* 1997). It is important to consider the position of the manager him/herself in the organization, his/her relation to current sales activities and possible conflicts within the organization due to KAM system implementation (Boles *et al.* 1999). There is also the problematic question of to what extent selling companies should adjust their internal structures, systems and processes to suit those of their key accounts (Millman & Wilson 1996). It is worth mentioning that for example Kempeners and van der Hart (1999) have

developed a model for decision-making in the design of account management systems, including decisions related to the integration and position of KAM, key account managers and teams.

Designing a suitable organization of individuals for key account management is also an essential part of the implementation process, e.g., selecting the right people as key account managers and for KAM teams (Ojasalo 2001). A key account manager needs to possess some skills and capabilities, such as integrity, product/service knowledge, communication skills, understanding of the buying company's business and business environment as well as selling and negotiating skills. (McDonald *et al.* 1997). The key account manager facilitates knowledge absorption from the customer, as he/she is responsible for the customer relationship as a whole instead of just single projects as in professional organizations (Nätti *et al.* 2006). Furthermore, the involvement of other employees besides key account managers is important in order to maximize resources, develop trust and build relationships (Abratt & Kelly 2002). Barret (1986) sees that in the case of account management there should be a group or a team of people influencing a team of buyers being able to reach the customer better. The members of the team can take care of the various contacts between the seller and the buyer, and the key account manager is in charge of this (McDonald *et al.* 1997). A key account team can be seen as a forum for discussing issues related to the specific customer, and it fosters internal knowledge-sharing, facilitating cooperation between different professional groups (Nätti *et al.* 2006).

Research methodology

This article is based on a qualitative, explorative single-case study in a professional service organization implementing the KAM system for the first time (Yin 2003). The case organization is named “Primum”. Our intention was to create new knowledge of the phenomenon under study by selecting a case rich in information.

Semi-structured interviews were the primary method used to collect data, and data collection took place in Primus at two different stages: before the KAM implementation process and during the process. Interviews revolved around themes that were organized in such a way that they covered the phenomena confronted internally in the professional service organization. Before the implementation process the themes focused on the prevailing challenges of customer relationship coordination, the characteristics of the professional organization and professionalism in general. Informants were also encouraged to tell about their customer relationships and their predominant ways of coordinating customer relationships in the organization on a practical level. At the second stage the interviewees involved were asked to tell about the key account management program, how it was organized and what parties were involved.

Informants at the first stage were people responsible for the organizational development and professionals conducting individual projects with the customers. At the second stage they were people responsible for key account management in the company. For example, key account managers and the development manager responsible for the KAM implementation were interviewed. A total of 11 interviews (of 8 informants) were done at the first stage during

2003 and 2004, 5 interviews were carried out at Primus during 2006, one of which was a group interview. Thus, the total amount of informants at this second stage was 7.

All interviews were audiotaped and transcribed. The research material including interviews, other documentation and notes of observation was analyzed with the help of content coding, theme-based categorization, matrixes and mind mapping. The analysis began by us reading the material through several times. During that process we picked up key words (coding) and discovered themes, which gave us the possibility to proceed to building matrixes of the different themes brought up related to potential challenges of KAM implementation, for example. Mind mapping was also helpful when developing connections between theoretical concepts and empirical phenomena.

During the research process it became evident that this data strongly emphasized the challenges confronted in the KAM implementation process and in this specific context. Therefore we chose to base our article on those themes. In the following, we present the case description and analysis, followed by managerial implications. In the end of the paper, empirically-based conclusions are drawn.

Empirical findings; challenges of KAM implementation in professional service organizations

The point of departure

Primus is a professional service organization offering educational and consultancy services in Finland. A lion's share of their customers come from companies representing traditional industries, such as paper and metal industries, but lately medium-sized companies from new industrial sectors and public organizations have also become more important customer segments.

The special expertise areas of Primum are human resource management, organization development, social and co-operative skills, production, economy, quality and project management. Thus, a wide variety of different types of expertise is represented, ranging from personal interaction skills to technical issues such as paper machine maintenance. Primum employs a total of 60 people. The organizational design is matrix-like, where the areas of expertise mentioned are combined into subgroups focusing on different types of professional services in the area of leadership, human resource management services, production technology and production-related services. Every expertise unit has its own superior, and internally in the unit, professionals responsible for narrower expertise areas. Professionals in the group usually have quite a similar type of education and/or background.

Based on this expertise of Primum, service offerings are formed for customers by planning and conducting open programs, company-specific programs and company-specific consulting, and by forming strategic partnerships with the customer. Among these services, strategic partnership is a new form of cooperation, whereas all the others are traditional ways of bringing the expertise of the organization to the customer. While building the business area of strategic partnerships, developing a key account management system for Primum has also become topical.

Primum started its key account management program approximately two years ago (2004), and the system is thus still quite new in the organization. For the most important customers, "strategic partners", Primum has chosen - based on their customer experience and industry orientation - consultants (all together 10

persons) to act as key account managers. Those consultants are also responsible for the key account management system implementation together with the development manager in charge. The aim is that key account managers meet up regularly to improve the system itself and to discuss account-specific issues, including key account portfolio updates. KAM activities naturally also include marketing and selling, as well as interactions like meetings with the customer, where the situation of the relationship is updated. Before KAM implementation there was already an information system established to handle customer-specific and expertise-related information organizationally. The kind of system is seen as a real asset from the key account management perspective, too.

Why set up a KAM system at Primum? The original plan has been that with the help of this system, key customer relationships could be more effectively and profitably coordinated on the organizational level. Earlier activities have been fragmented, and every professional has more or less coordinated their own customer relationships. This has led to a situation where the service offering may have been one-sided and interactions with the client representatives unsystematic. Thus, there has been no one taking care of the relationship itself, although many professionals might have been conducting individual projects simultaneously for the same customer. From the customer point of view, fragmented actions have often been perceived as distracting; for example, two experts from Primum may have worked intensively with the customer within their own projects without knowledge of each other, or similar types of services have been offered by different professionals from Primum. There were thus plenty of overlapping activities.

Challenges faced in Primum's KAM implementation

From the empirical data it became evident that there are certain dilemmas in implementing the KAM system in professional service organizations. Firstly, there seems to be a *search of balance between controlling the system and local flexibility* gained by delegating power to the managers. The idea of establishing a KAM system was brought up by the higher management of the company, which has also done strategic planning and organized KAM activities. However, in the implementation process the power was to a large extent delegated to the key account managers, whereas they found that their field of activities should be more thoroughly defined and there should an obligation to report to the management board. Thus, as is usually the case in professional organizations, freedom is valued, but people in charge of the KAM system also seem to appreciate a certain level of formal control system.

“Well the fact is that we have the customers, we have a system, we have an organization so to speak, but no one's really given much thought to the way the process actually works.” (Consultant A)

Secondly, based on the empirical material it is interesting to evaluate *to what extent the KAM system should be integrated* to the professional organization itself, and to what extent it should be kept separate. Should there be separate key account managers on a full-time basis, or should the professionals themselves take care of the activities besides their work as an expert? From one point of view it is natural that professionals take care of the KAM activities, for they are interacting intensively with the customer. However, in that case they have to do it besides their “everyday work”. In such a scenario, do

they have the time and resources to conduct such time-consuming tasks as relationship coordination, selling the holistic offering of an organization to the key customer, and in many ways maintaining the relationship above the project-level activities? Are professionals even willing to do that?

“...in my case and maybe with other KAMs or the like as well you kind of get this gut feeling that you're most at home being that expert, and you've got so much to give there that you really don't want to do these things, but the thing is that they've had to appoint someone.” (Consultant C)

“...you just can't find time for it, and it's just not in my nature to take that time from the productive work I do. And then it just kind of gets neglected. Taking care of those KAM activities.” (Consultant C)

If the KAM is one of the professionals, are the roles clear, does a real KAM organization even exist? Does the customer know who is responsible for that specific relationship on a long-term basis? This is related to the third dilemma, i.e., *the role of information gatekeeping between the seller and buyer*. On the one hand it is beneficial to keep as many actors as possible in contact with the customer, and it is also beneficial if as many actors as possible are active on the customer side. In that way information flows are not prohibited between the organizations by a single actor. However, such multiple relationships make relationship coordination and customer knowledge management more difficult. The KAM system should also be seen from the customer knowledge management point of view.

“...the problem here may be that the experts that we've got in this expert organization, they're all very independent, and very stubborn, and,

well, they might even kind of think that, erm, because knowledge equals power, you should keep it to yourself and not share it with others.” (Consultant B)

There are also some *underlying structures of the organization* challenging KAM implementation at Primum which we were able to define. These structures naturally influence the phenomena mentioned earlier and are in that sense overlapping, but still worth mentioning. First of all, *professionalism* and the *professionals* themselves. Expertise possessed by the professionals is an important prerequisite for service production in this context. Besides professionalism, the key account manager needs wider understanding of the entire industry of the customer they are

working with. In addition, it is expected that KAM has a holistic understanding of the whole service offering its organization has. The KAM is an actor who connects seller and buyer, and brings the right service to the customer. However, professionals named to be KAMs often lack passion towards anything else except professional work in their own area of expertise and developing their own expertise further. Experts seem to be highly project-oriented, and customer relationship coordination is not seen as being “a real job.” They are not particularly interested in widening their understanding on the expertise possessed by the whole organization. This is also related to the fact that in the KAM role, the expert has a possibility to “monopolize” the customer when the

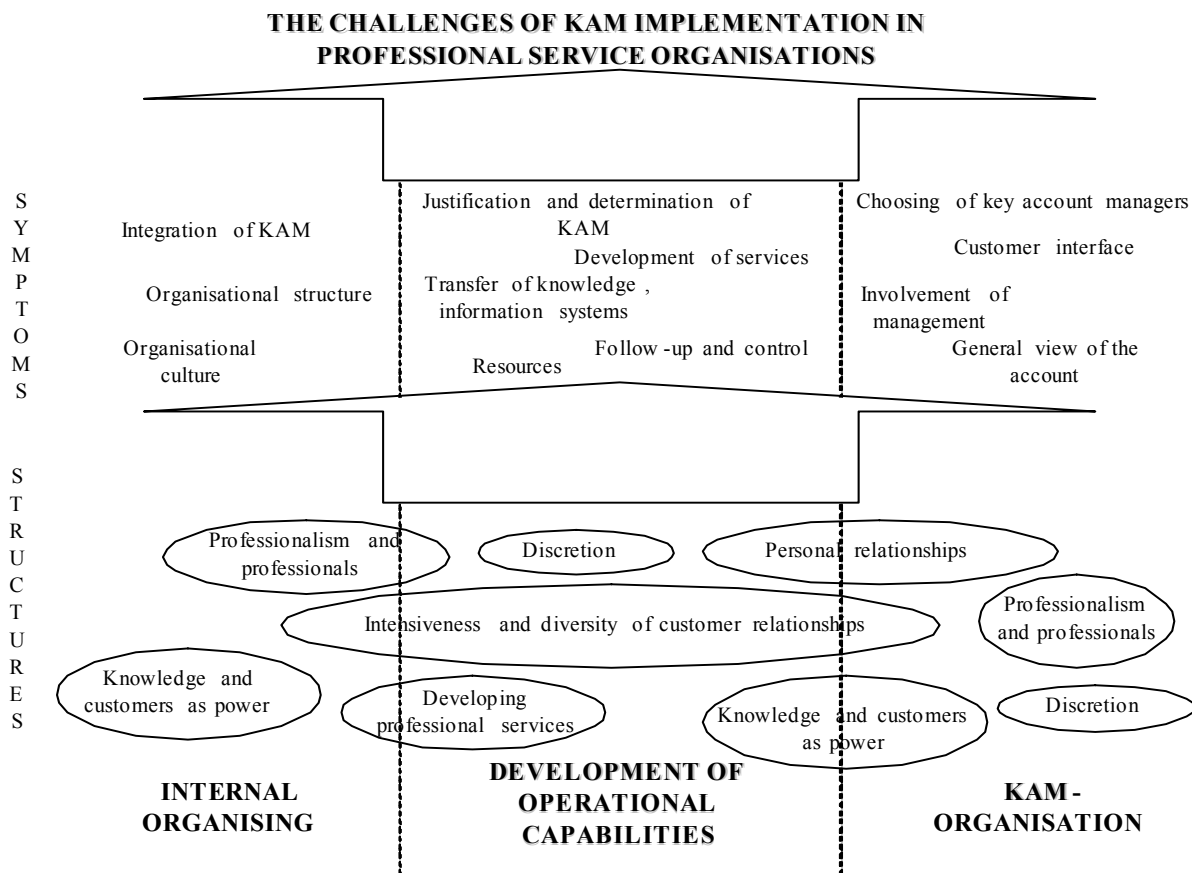


Figure 1. The challenges of key account implementation in professional service organizations.

relationship is viewed only from the own expertise point of view, whereas a more holistic approach would be more beneficial to the customer. This might also lead to customer knowledge protectionism, which may further hamper the relationship coordination.

“...when you’ve got big companies [as customers], interesting new openings that actually interest you, you’d like to be involved [in project implementation]. And I think this is the case with every KAM who’s also an expert in some field, that there’s this kind of natural incentive there in all your development and actions.” (Director G)

Looking from another point of view, it may be hard for an expert doing a project with the customer to cooperate with the named KAM because of a strong will to conduct a project on an individualistic basis as usual. Customer relationships are very *intensive, diverse* and may be based on long cooperation the client. Because of the variety and intensity of the relationships and the influence of professionalism described earlier, discretion seems to be needed when implementing key account management. Experts might even see this kind of organization-level coordination system as an attack towards their highly appreciated autonomy in the work.

“We have different trainers who are in charge of all these individual product groups that we’ve got here. So the thing is, they work very independently, and are in touch with companies very independently, so in a worst-case scenario it leads to a kind of hassle where no one really knows what we’re doing with each individual company. And from the viewpoint of our operation that can lead to some pretty weird and even embarrassing situations...” (Consultant B)

“Because many people have this attitude that since they’ve always cooperated with this company, and they’ve got people there that they know well, they’re going to be working with them in the future as well, and that’s the way it should be.” (Consultant B)

As mentioned, professionals may often think that the *customer knowledge they possess improves their power position* in the organization, and that is why they do not like to share it with others. This poses an even greater challenge on the coordination of customer interaction. Partly because of this, common IT systems are not actively used to share customer knowledge. This hampers coordination efforts because knowledge is not accessible to experts and KAMs.

Conclusions

The purpose of this paper was to define what kind of challenges there are for KAM system implementation in the specific context of professional service organization. Following from the previous empirical analysis, conclusions are illustrated in the following figure, which is divided into two main parts: underlying structures and the symptoms caused by them. The structures and symptoms are related to the earlier analyzed aspects of organizations’ operational capabilities needed in KAM implementation, organizing the KAM system and finally, KAM organization and its individuals.

Some underlying structures can be recognised that challenge the implementation of key account management in a professional organization. These structures are caused by special qualities and characteristics of professional work, professional service organizations and services. We have identified

six main underlying structures: professionalism and the professionals themselves, the development of professional services, possession of customers and knowledge, personal relationships, intensity and diversity of customer relationships and the need for discretion. These structures cause some symptoms and challenges that need to be solved when implementing KAM.

As mentioned in earlier theory, *operational capabilities* can involve the development of services, organizational structure, information transfer and individuals of the organization. Besides these, some other capabilities can also be recognized that are linked to professional service organizations such as resources, follow-up and control mechanisms as well as the importance of justification and determination of goals in the implementation process.

In the context of professional service organizations it is important to justify the actions of a system like KAM as the preliminary attitudes of the professionals may not be supportive towards a system such as key account management. Another operational capability concerns follow-up and control mechanisms. Clear responsibilities and tasks need to be defined. Efficient follow-up and coordination also emphasizes the importance of the KAM system for the whole organization, which is needed in order to facilitate the implementation process. However, flexibility is also needed, as clients differ from each other and flexibility is highly appreciated among professionals. Discretion is also needed, because the development of professional services is a very intensive process with the customer, and personal contacts and tacit knowledge of the customer may thus play a central role in that process. Those who know the customer well

based on earlier cooperation should not be left aside.

Perhaps the most important operational capability in the specific context of professional service organizations is the ability to transfer knowledge. Basically this means sharing of customer information and expertise in order to coordinate customer relationships successfully, and being able to recognize needs and potential offerings for those needs. This may, however, be difficult, as many professionals have their own personal relationships with the customer and these relationships are very intensive and diverse in nature. Professionals may not be willing to share their knowledge on customers or a specific area of expertise as they may feel that their position and status within the organization is improved by knowledge and customers. This is seen further for example as unwillingness to update and utilize common IT systems, such as the CRM system.

The reason for the intensity and variety of customer relationships is partly the way professional services are developed and sold: with the customers in a very intensive process. The selling, producing and marketing of services are all integrated in a process where customers and professionals work together. The very challenge is indeed how to coordinate this process effectively with a tool like key account management.

When implementing key account management, one crucial task concerns the *internal organizing of the KAM system*. Developing operational capabilities is naturally one part of this, but there are also some other things to consider besides this. Considering the integration of the key account management system is one of the first steps in the implementation process, as it is

possible to establish a wholly separate organization for KAM, or it can be integrated into the organization. The position of key account management also needs to be clearly expressed in the structure positioning in the customer interface.

Organizational culture also needs to support the implementation of key account management by being customer-oriented and cooperative. In a professional organization where services are developed in an intensive relationship with the customers, people and their actions are naturally very much customer oriented, “outward” looking. Internal cooperation in the professional organization on the other hand may be more problematic as professionals may not want to share their knowledge on customers or expertise. Key account management could also be seen as a potential forum for cooperation.

When implementing key account management, a suitable *KAM organization* has to be developed. This mainly means selecting key account managers who are responsible for the KAM system. There are many requirements for these managers as they need to possess professionalism and wider understanding as well as the ability and willingness to serve the customers and answer their needs. Unfortunately, professionals may not see a system such as key account management worth working for besides their professional work in individual customer projects.

Along with choosing the key account manager, developing key account teams may be very useful in the context of professional service organization, as professionals meet up regularly and share information in the teams. Customers can also be involved in these teams besides professionals.

The following themes for further research and limitations emerged from the present study. As a qualitative single case study has some limitations concerning the possibilities to make a comparative analysis, it would be interesting to conduct a multiple case study in the future including other than professional service organizations. Based on that, interesting comparisons could be made. In this study we focused solely on educational and consultancy services, which is why it would be interesting to study the phenomenon in other professional industries as well. As we interviewed only people from the professional service organization, the viewpoint of customers would provide an additional perspective on the phenomenon under study.

Managerial implications

Certain managerial viewpoints and approaches can be suggested worth considering in the implementation process and/or to compensate the negative influences that may be caused by underlying structures in the professional service organization. When implementing key account management, there are some problems and challenges that managers need to solve in order to succeed. First of all, *justification and determination of goals* seems to be quite a challenging task in the implementation process of key account management in a professional service organization. The attitudes of professionals may be quite negative towards actions such as KAM, and it may therefore be difficult to make them understand why the system is being implemented in the first place. The goals should be determined collectively and they should be outlined systematically on a continuous basis. This calls for special attention in the implementation process. Another challenge relating to this is weak and low *commitment of*

experts which hinders the KAM implementation. In order to achieve high commitment from the whole organization and especially from the persons that are directly involved, goals and tasks should be clearly determined and KAM system implementation justified so that experts are able to see how the system can also benefit them on an individual level, for that may be the most meaningful point of view for professionals. It is also important to notice that if those benefits are not realized quite soon, the motivation to maintain the system may vanish.

Involvement of the top management is also an important prerequisite in the implementation process. Effective *follow-up and control* are important ingredients in KAM implementation and achieving commitment from others, but this also seems challenging in this context. There clearly is a need for some clear guidelines and responsibilities from the top management in order to get some results, but on the other hand, flexibility is also needed because different customers need different ways of action and there are also earlier, intensive professional-customer relationships that cannot be overlooked. The same plans of action do not apply in every situation. This is quite conflicting and challenging as both ways are needed, but some sort of compromise has to be found.

Another challenge concerns the organizational *structure and resources*. Organizational structure should be modified in order to support key account management. There has to be a clear position for key account management in the structure, and this should be clearly communicated to the personnel. On the other hand, the implementation of the system and the development of organizational structure at the same time may be too many changes too soon, so incremental and consistent change as well as

discretion is also needed. Another decision has to be made about the *integration of key account management*. One option is to establish a separate organization for key account management with full-time account managers who have their own subordinates. If key account management is integrated into the organization, there are different possibilities. One option is for professionals themselves to work as key account managers on a part-time basis. Another option is to have industry-specific key account managers working as a pair side by side with professionals in a specific industry. These managers work full time. Each organization has to decide which solution is best for them. Lack of resources may be a problem concerning the implementation process. It should therefore be guaranteed that the people involved have enough time to focus on their efforts to build up reasonable KAM activities. If the strategic choice to establish KAM system is made, sufficient resources to maintain it should also be provided in any case. Otherwise the work conducted may be wasted. Based on our empirical material, it should be carefully considered whether the best alternative is to choose a professional to act as a KAM besides his/her other jobs, or whether someone should take on the task on a full-time basis.

In the process of *choosing key account managers* there are many factors that need to be considered. That is why it is also a challenging task. Key account managers need to possess a sufficient degree of professionalism, but they also need wider understanding concerning the expertise areas and services the whole professional service organization is able to provide in order to be able to answer the customers' needs properly. Besides this they should also be willing to act as key account managers.

One major challenge concerned the *transfer of knowledge*, both internal and external to organizations, e.g., customer-related or expertise-related information. This is a crucial element supporting key account management. On the one hand there needs to be cultural cohesion that fosters cooperation and knowledge-sharing among the experts, but also a conscious effort to steer the knowledge sharing via a CRM system, for example. This would improve knowledge transfer and utilization, thus supporting the coordination of customer interaction. Systemic readiness is only developed by influencing attitudes, clearing up the motivation behind using those systems, showing why it is beneficial for the customer and for the experts themselves, and by tearing down the competitive attitudes internally in the organization. Those attitudes may namely lead to further knowledge protectionism and hamper the effectiveness of the KAM system.

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