

VOLUME 27 ISSUE 2 2025

VELOCITY

KNOWLEDGE TO SPEED PAST THE COMPETITION

FUTURE-READY SAM

INSIGHT-LED, EMOTIONALLY INTELLIGENT, TECH-EMPOWERED



STRATEGIC ACCOUNT MANAGEMENT ASSOCIATION

THE DAWN OF THE COMMERCIAL INSIGHT STRATEGIST

An enterprise sales evolution long in the making



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For years, strategic account managers (SAMs) have navigated an increasingly complex sales landscape. Digital transformation, AI, and shifting customer expectations about what they value and need from vendors have rewritten the rules of engagement.

Yet, despite an abundance of data, SAMs continue to face one fundamental challenge: converting account intelligence into actionable insight that enables them to be relevant to executive buyers.

SAMs are overwhelmed — not by a lack of information, but by the sheer volume of it. News alerts, competitive insights, executive shifts, earnings reports, customer sentiment data — it's all there, waiting to be harnessed. The challenge? There's no scalable way to filter, contextualize, and act on this information at the speed of business in the context of the very complex relationship-management role they play, both internally and externally.

The role of the SAM has never been more demanding. Without a way to stay ahead of shifting customer priorities, teams are left reacting instead of leading.

Enter the commercial insight strategist (CIS).

The catalyst: The SAM overload and the hidden opportunity

Two years ago, while we were working with large enterprise account teams, a reoccurring frustration surfaced: "We know there are opportunities hidden in all this data, but we don't have time to find them, let alone activate them."

Despite being inundated with reports, market trends, and stakeholder insights, SAMs lacked a structured way to uncover, prioritize, monitor, and convert these data points into actionable growth strategies. Rather than using intelligence to proactively shape conversations, account teams found themselves scrambling to keep up.

The unspoken challenges holding SAMs back

1. Misalignment between internal capabilities and customer needs.
2. Over-reliance on product-first selling instead of insight-led engagement.
3. A struggle to engage key decision-makers at the right altitude.

Even with AI-powered tools at their disposal, teams still lacked the right data and a cohesive, repeatable method to transform intelligence into high-value engagements efficiently week in and week out.

That's when the opportunity became clear: the most successful account teams had a human in the loop — someone who could bridge the gap between the data and the output. Someone who could extract the right insights at the right time, align the appropriate stakeholders, and equip SAMs to lead conversations before the customer even recognized the need.

That was the moment the commercial insight strategist was born.

Defining the role: The CIS as the AI-enabled, human-in-the-loop insight engine

The commercial insight strategist is not just another research role, nor a traditional sales function. The CIS is a hybrid: a detective, a reporter, and an interpreter, blending investigative analysis with strategic storytelling.

- Like a detective, the CIS uncovers hidden patterns and untapped opportunities within complex customer data.
- Like a reporter, they synthesize scattered intelligence into a compelling, digestible narrative.
- Like an interpreter, they translate insights into actionable strategies tailored to the SAM and the broader account team.

The key differentiator? AI can surface data, but it takes human intelligence to recognize the patterns, connect the dots, and drive action.

The AI-enabled, human-in-the-loop process

- AI accelerates research, detects patterns, and organizes findings.
- The CIS applies judgment, creativity, and strategic storytelling to make sure that the insights are meaningful and actionable as well as ensuring the data sources feeding AI

are comprehensive and continuously updated.

The results were immediate: SAMs were empowered to engage with the right intelligence at the right time. With every customer-focused insight being timely, relevant, and aligned to the customer's evolving priorities, account teams were no longer reacting; they were leading.

The strategic account team's secret weapon

B2B buyers now expect more than just solutions — they expect partners who understand their world and can help them address their challenges when they happen. While strategic account teams have long recognized the need to engage customers with insight, the reality is stark: too many sales conversations fail to resonate. Research shows that 79% of buyers prioritize vendors who demonstrate a deep understanding of their business, yet only 11% of sales conversations are considered relevant by executive decision-makers. According to Gartner, 83% of sales leaders say their teams can't keep up with changing buyer needs and expectations.

The gap is clear — most account teams are still struggling to make their insights actionable and timely.

Without the right intelligence at the right moment, SAMs risk becoming just another vendor competing for attention, which often results in a lost investment in wasted time and effort. The CIS shifts this dynamic by equipping account teams with intelligence that's not only relevant but also strategically timed and aligned with what truly matters to the customer.

Traditional methods for identifying customer needs — scouring CRM records, reviewing analyst reports, and piecing together insights from various departments — are no longer sufficient in today's fast-moving business environment. Customers don't announce their priorities in clear terms; they reveal them through fragmented signals, such as leadership shifts, regulatory changes, competitive investments, and emerging market trends. A CIS's ability to identify and synthesize these signals at the speed of business and monitor the changing conditions associated with these situations over time makes them indispensable.

Embedding the CIS into the strategic account teams delivers a measurable impact. When insights drive customer conversations, win rates increase by 22%. Engaging the right stakeholders earlier in the buying process speeds up sales cycles by 31%. Most importantly, integrating CIS-led

intelligence into account planning expands the customer-driven pipeline, ensuring teams aren't just chasing what's in the CRM but uncovering entirely new growth opportunities.

The CIS is more than just a support function for SAMs — it enables them to lead. Instead of relying on outdated insights, they have real-time intelligence. Instead of struggling to differentiate, they enter executive conversations with a clear, strategic point of view.

In an environment where relevance determines success, a commercial insight strategist is the key to unlocking a competitive advantage.



The CIS in action: Real-world impact

The value of the CIS role becomes evident in real-world scenarios where traditional sales methods fall short.

Case Study #1: Securing a competitive win in a multi-year contract renewal

A strategic account team faced a critical contract renewal. The challenge? A complete turnover in the customer's executive leadership team just months before the renewal decision. The account team had longstanding relationships with the previous decision-makers, but with the shift in leadership, those connections were irrelevant. The new executives had different priorities, different pressures, and little familiarity with the incumbent vendor.

The CIS went to work immediately: mapping the new executive landscape, identifying each leader's priorities, and uncovering key business initiatives that would drive their renewal decision.

They analyzed leadership interviews, earnings call transcripts, and industry reports to understand the new team's objectives and pinpointed the key decision-makers and influencers beyond just procurement.

By framing the renewal conversation around the customer's strategic goals, not just contract terms, the account team repositioned themselves as a long-term partner, securing a multi-million-dollar win at a higher value than the previous term.

Case Study #2: Turning a federal funding crisis into a growth opportunity

A telecommunications company faced a sudden revenue

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gap when a federal funding program that subsidized key customer accounts was abruptly canceled. Without this funding, dozens of high-value customers were at risk of churning.

Instead of reacting with a short-term solution, the CIS took a broader view of the situation, identifying how the funding change impacted not just the client but the entire industry.

- They conducted a deep analysis of regulatory shifts and alternative funding mechanisms that could replace the lost subsidies.
- They mapped the extent of exposure across multiple customers, allowing the company to proactively engage accounts before they churned.
- They positioned the SAM team to offer an alternative, fee-based model, not just as a reaction to lost funding but as a strategic transition plan that aligned with broader industry trends.

The result?

What could have been a devastating loss became a growth opportunity. Not only did the CIS help retain high-risk accounts, but the insights were also used to inform industry-wide discussions, feeding intelligence into marketing, risk,



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accelerate, and hidden opportunities emerge that would otherwise have been missed.

The future: Why every enterprise sales team needs a CIS

AI is reshaping the way sales teams operate, but AI alone is not the solution. The companies that will thrive are the ones that recognize a simple truth: technology is only as powerful as the people who use it.

The CIS represents the next evolution in strategic account management — the human intelligence needed to complement AI-driven insights. Without this role, account teams will continue to struggle with too much information and too little clarity.

Companies that embrace the CIS role will see stronger customer relationships, larger deal sizes, and faster growth. Account teams that fail to adapt will fall behind in a market that increasingly demands precision, insight, and relevance.

The question isn't whether organizations need a CIS — the question is how long they can afford to wait before making it a standard part of their sales strategy.

The invisible pipeline becomes visible

For too long, high-value sales opportunities have remained hidden beneath mountains of untapped intelligence.

With AI-powered tools, account teams now have access to more data than ever, but without a dedicated human in the loop to translate that data into action, its value remains unrealized.

The commercial insight strategist plays that crucial role, curating intelligence, identifying emerging opportunities, and ensuring strategic conversations happen at the right time.

Companies that have already implemented the CIS role are seeing measurable impacts. In just a few months, organizations have surfaced 300-600 new qualified opportunities, many of which would have gone unnoticed using

and finance teams. This proactive approach transformed a retention challenge into the company's highest growth account of the year.

Clarifying the role: How the CIS fits into a strategic account team

A commercial insight strategist is a complementary role to a strategic account manager. While a SAM owns the customer relationship and revenue strategy, a CIS enables insight-driven engagement, ensuring every interaction is strategically informed.

In large enterprise sales, information overload is a serious risk. Teams often get caught up in reactive motions, chasing urgent tasks rather than focusing on long-term, strategic account growth.

The CIS helps filter the noise, curates intelligence, and ensures that the SAM team leads with insight, not just products.

For companies with a structured SAM program, the CIS works alongside account leaders to provide research-driven insights that shape customer conversations.

For companies without a formal key account program, the CIS can act as a strategic intelligence hub, supporting sales, marketing, and customer success teams with data-driven account growth strategies.

The impact is undeniable: when companies embed the CIS role into their account teams, win rates improve, sales cycles

traditional research methods. Some account teams have seen their pipeline grow by 5x simply by applying the right insights to the right conversations.

Amanda McBride, Vice President of Enterprise Account Strategy & Enablement at Vaco Holdings, shared how the right intelligence surfaced at the right moment enabled her team to act decisively on a key opportunity.

“Just last week we actually had an insight delivered in our inbox,” she said. “We hadn’t seen it yet in the platform. We sent it to one another, and we have some internal strategy sessions this week for an upcoming meeting with one of the senior-level stakeholders. That’s actually an account that is not yet in our relationship mix under contract. The CIS saw something big in the market, and saw it first, which enabled us to begin to act. We probably wouldn’t have seen it until 48 to 72 hours later.”

This kind of real-time intelligence sharing is what makes a commercial insight strategist indispensable. They focus on delivering the right actionable insights at the right time to move the business forward.

The future of strategic account management isn’t just about managing relationships — it’s about leading them. For those embracing the commercial insight strategist, the invisible pipeline of untapped growth is no longer out of reach — it’s finally in focus. ■

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Your CRM should be your launchpad—not your roadblock

Too many key account strategies stall because their company’s CRM isn’t built for today’s customer complexity and the barriers they face. With the right system, you can orchestrate customer-facing teams, streamline workflows and deliver on the promise of key account management (KAM).

We help companies implement customer-first CRM designed to support KAM.



Let’s talk.

