PRESENTED TO SODA

AM:PM

SoDA

AM + PM.
SHARED MOMENTUM.

AM and PM: collaborating for maximum advantage

Brett Harned + Jenny Plant / November 18, 2026

TWO PERSPECTIVES. ONE SHARED DIRECTION.



BRETT HARNED

Delivery leadership
Consultant, coach and author



JENNY PLANT

Account leadership
Founder, Account Management Skills

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AM:PM CONFERENCE / theampmevent.com

FROM A REQUEST TO A COMMITMENT.

01 The client experience

02 The work behind the roles

03 Collaboration in practice

04 AI and human judgment

05 Make it work in your agency

01

THE CLIENT EXPERIENCE.

AM:PM / Brett Harned + Jenny Plant

“The deadline hasn’t changed.
Can we just add this?”

BEFORE ANYONE SAYS YES.

Who understands the need?

Who assesses the impact?

Who agrees the commitment?

CLIENTS EXPERIENCE THE WHOLE AGENCY.

Reasons surveyed clients gave for ending agency relationships

61%

Dissatisfaction with delivery

61%

Dissatisfaction with value

44%

Agency did not understand their business

Setup + CMO Institute / 2025 Marketing Relationship Survey
About 100 agency and client respondents; 57% clients. Multiple reasons could be selected.

02

THE WORK BEHIND THE ROLES.

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TURN CURIOSITY INTO USEFUL ACTION.

AM / ACCOUNT LEADERSHIP

Curious

Investigates what changed

Commercially thoughtful

Connects ideas to business value

Candid

Negotiates expectations early

Proactive

Follows through beyond the project

IN THE WORK Stakeholder map / Account plan / Business review / Renewal forecast

MAKE REALITY EASIER TO ACT ON.

PM / DELIVERY LEADERSHIP

Systems-minded

Tests assumptions and dependencies

Facilitative

Brings the right people into decisions

Candid and empathetic

Raises risk without blame

Decisive

Clarifies ownership and follows through

IN THE WORK Delivery plan / Scope and budget forecast / Risk log / Decision record

ONE BEHAVIOR WORTH BORROWING.

AM / JENNY'S STORY

The situation.
The specific action.
The behavior to borrow.

VISUAL TO ADD

Personal story visual or quote. Choose after the story is confirmed.

ONE BEHAVIOR WORTH BORROWING.

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SHARED CONCERN. CLEAR DECISIONS.

Client trust

Scope and risk

Value and profitability

AM / Business context

PM / Delivery reality

Who leads? Who partners? Who approves?

A HYBRID NEEDS ROOM TO DO BOTH.

01 A manageable portfolio

02 The skills and time for both functions

03 Clear priorities and decision authority

04 Support and reliable coverage

SEPARATE WHEN THE WORK NEEDS ATTENTION.

01 Account development repeatedly loses time

02 Delivery complexity needs dedicated leadership

03 The owner remains the default escalation

04 The economics support distinct contributions

03

COLLABORATION IN PRACTICE.

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A SIGNED SOW NEEDS CONTEXT.

Business goal and measures of success

Scope assumptions and commitments

Stakeholders and decision process

Known risks and open questions

The receiving owner confirms readiness.

TWO WEEKS TO LAUNCH. ONE NEW INTEGRATION.

ILLUSTRATIVE CASE / FICTIONAL DETAILS

Six-week website project. Two weeks remain. The launch date stays fixed.

AM / UNDERSTAND THE NEED

A board demonstration is the immediate business need.

PM / ASSESS IMPACT

Integration needs testing, API access and client approval.

BUILD THE RECOMMENDATION TOGETHER.

AM

Clarify purpose and explain the recommendation.

→

PM + specialists

Check feasibility, estimate and document the plan.

Authorized approvers

Agree scope, fee and commitment before scheduling.

→

AM + PM

Record the decision and follow through.

Keep launch scope. Label the board prototype. Scope production integration separately.

GIVE CLIENTS A CLEAR WAY IN.

Explain each role’s contribution

Name the lead for each conversation

Keep commitments visible to both roles

Bring the right expertise into the room

VISUAL TO ADD

Client-facing role introduction or an example meeting agenda.

THE JOB DESCRIPTION IS THE BEGINNING.

ANONYMIZED IMPLEMENTATION LESSON

Roles were defined

Situations revealed different interpretations

Strong pairings had found a rhythm

Shared expectations needed to travel

Make the essentials dependable across accounts and pairings.

CHANGE THE WORK. SUPPORT THE PEOPLE.

01 Explain what changes in practice

02 Assess fit and develop skills

03 Change workload and authority together

04 Coach with real account situations

05 Review adoption and adjust

04

AI AND HUMAN JUDGMENT.

AM:PM / Brett Harned + Jenny Plant

LET AI PREPARE THE IMPACT BRIEF.

PERMITTED INPUTS

Approved SOW
Client request
Current delivery plan
Checked team notes

FICTIONAL DRAFT / REQUIRES REVIEW

CRM integration is not listed in the supplied scope. Access, testing effort and approval dates are unconfirmed.

PM + technical lead: verify impact. AM: check business context. Authorized people agree the commitment.

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OUTSOURCE THE TASK. KEEP THE JUDGMENT.

Source checks / Business context / Feasibility / Approval

SPEND RECOVERED TIME ON BETTER DECISIONS.

Better client understanding

Earlier risk conversations

Stronger recommendations

More sustainable delivery

Verify the savings. Measure what improves.

05

MAKE IT WORK IN YOUR AGENCY.

ONE ACCOUNT.
ONE RECURRING DECISION.

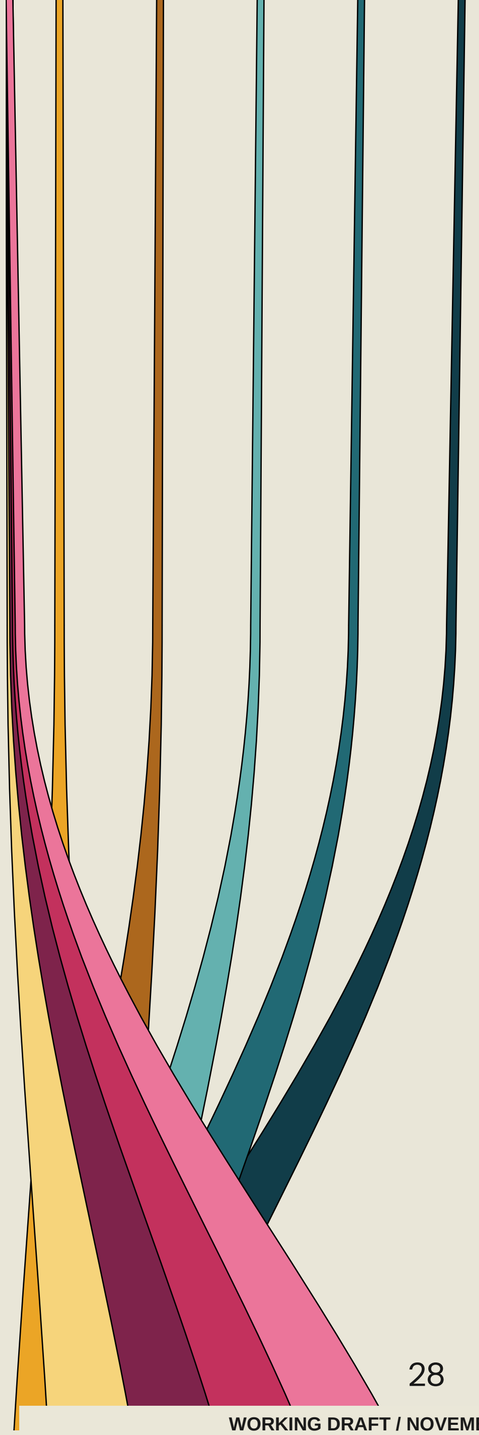
01 Choose a point of friction

02 Name the lead, partners and approver

03 Agree the information and response time

04 Test it on one account

05 Review what happened together



MAKE THE COMMITMENT TOGETHER.

Bring business need and delivery reality into the same conversation.

LET'S TALK ABOUT YOUR AGENCY.

Where does ownership become unclear?

What would help your team make a better commitment?

AM:PM

THANK YOU.

Grab the slides and learn more about Brett, Jenny and AM:PM.

brettharned.com/ampm

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Jenny Plant

account management skills

accountmanagementskills.com

SOURCES AND FURTHER READING.

CLIENT EXPECTATIONS

Setup + CMO Institute
2025 Marketing Relationship Survey
Full URL in speaker notes.

OUR PRACTICE

Harnessing the AM and PM tension
The Modern Project Manager
The Modern Account Manager

ROLE CONTEXT

Jenny Plant / Why hybrid account managers struggle to grow accounts
accountmanagementskills.com

AI CONTEXT

Productive / Agencies in the AI Era 2.0
productive.io/reports/agencies-in-the-ai-era-pulse-report/