Account Planning - description

- An account planning session takes a group of sellers, all selling to the same customer, and leads them through a planning process where they define sales strategy and action plans for that specific account. The account planning session focuses on the early stages of the sales cycle, where sellers are typically identifying new opportunities, seeing how existing business can lead on to new work, finding the influencers / decision makers, understanding the customers structure, business and IT environment. There are 2 variations - depending on the sizes of the sales teams:

    - Integrated accounts - for large account teams, from 10-30 people, representing all products and services

    - Clustered account planning- for small sales teams. In one AP session we can effectively cover 4 teams of 4-6 sellers - sometimes representing specific products and services.

Objective:

- To create an account plan based on your customer's business priorities that the sales team will then commit to execute over a given time period. The plan will include action plans regarding specific sales opportunities.

The benefits and key deliverables

- An action plan that will be executed in the weeks after the planning session, and assessed by sales people and managers

- A documented plan that can be validated with the customer.

- Common language, and buy-in in to a common strategy from the entire sales team

- A clear understanding of the lines of responsibility, an extensive relationship plan, who should be speaking to who and about what!

- Relationship and coverage strategy (who is responsible for which relationships).

- A comprehensive view of the customers business, projects, plans and problems, and what we are trying to sell to them