

Account Planning - Course Description

- Participants:** Sales, Sales Support and Sales Management (advisable).
- Time:** 2 days (theory + practice) or 1 day (theory only).
- Course preparation:** List all accounts with 12 month revenue history; gain as much business information as possible for each account.
- Preferred prior training:** Solution Sales.

Course Overview

The pressure upon salespeople to gain incremental revenue in highly competitive markets is constant. A 'scattergun' approach to selling frequently ensues in the hope that a deal is occasionally won. To overcome this, the course ensures a strategic, highly focused approach to managing accounts and sales opportunities by implementing a best practice Account Planning process.

This Account Planning course helps participants to ensure a focus upon the most rewarding accounts with the most efficient utilization of available resources.

Performance Objectives

- Account Managers better understand how to use Account Planning to achieve sales and relationship objectives
- Assist Account Managers to improve the quality of account plans - best practice account planning becomes common practice
- Account action-plans defined during clinics (2 day course)

Course Objectives

- Assist Account and Sales Managers to review account plans to:
 - improve the quality and practical value of account plans
 - use the account plan to uplift sales and further customer relationships
 - develop action plans
 - help drive up profitable revenues
- Review a best practice model account plan to turn best practice into common practice
- Initiate a quarterly review process by incorporating account planning into common business practice
- Provide a consistent approach to account planning and account reviews

To enquire about booking this course to help your sales organisation achieve better and more results send an email to training@paullange.com.au. The latest version of this course description and other available course can be found online at <http://www.paullange.com.au/training-courses.html>

Understanding your business

- Gap analysis to determine fiscal year target requirement

Growth strategy

- Alignment of sales cycle with the customer's buying cycle
- Understanding latent and active customer pain
- Identifying addressable revenue
- Customer business initiatives
- Net new revenue opportunities

Account segmentation

- Segment either account within a territory or business units within an account
- Invest resources proportionately to potential
- Determine your resource allocation decisions based upon a clear business oriented strategy

Strategic initiatives

- Develop a snap shot of performance against key customer drivers
- Identify areas of need for focus
- Analysis shows connections between drivers

Opportunity prioritisation

- Current Importance
 - Near term revenue contribution
 - Impact on Customer Satisfaction
 - Impact on targeted product/service/solution areas
 - Addresses active pain
- Future Importance
 - Long term revenue contribution
 - Long term strategic value (new market, key unit inside a customer, etc.)
 - Addresses latent pain

Gap closure plan

- Demand Generation (net new opportunities)
 - Customer Assessment– One-to-one discovery
 - Marketing Campaigns– One-to-many lead generation
- Opportunity Acceleration (existing opportunities)
 - Close sooner through focus on compelling need to buy
 - Enlargement through understanding compelling need to buy