Sample Account Planning Template

Developed by Revegy, Inc.

Revegy has developed this Account Planning Template which incorporates account planning best practices to be utilized by your strategic accounts, regional, national, or global sales teams. The template is designed to help achieve consistency in your core planning processes and to establish a common language across these disparate sales organizations.

Developing a discipline of strong account planning will offer a vehicle for development of highly-effective account strategies and tactical opportunity execution plans. It should also provide a valuable mechanism for enabling collaboration across your internal sales teams and with your customer teams – all while produce greater management visibility and insight into current and historical activities and future account potential.

The Essential Components of a Highly-effective Account Plan*

I. Customer Landscape

- Relationship Map
- Whitespace Map
- Strategy Map
- Project Status
- Customer Value Scorecard

II. Revenue Snapshot

- Financial Information
- Revenue Summary
- Spend
- Current Opportunities
- Projected/Hypothetical Opportunities
- Won Opportunities
- Opportunity Summary Analysis

III. Account Goals (Revenue, Relationship, Customer Success)

- Internal Action Plan
- Risk/Barriers/Limitations

IV. Plan Administration

- Account Overview
- Account Team Information

** Revegy Advice – we strongly recommend using sales process maps and execution playbooks to ensure consistent execution on your account plans. A process map should be a visual, interactive representation of your account plan that helps improve the effectiveness of your entire sales team by getting everyone focused on high-value execution activities, delivery of the right sales assets at the right time (and to the right individuals), and knowing the best next steps to win deals and expand key accounts. Click here to learn more about Revegy's Execution Playbooks.*

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I. Customer Landscape

Relationship Map

The Relationship Map is a visual representation of all the key stakeholders and influencers. The map represents friends, foes, and third-party influencers, which is critical to help your team identify risks and build quality close plans. You may also leverage social media and business content providers to research individuals, connections and determine the relationships you need to foster to be successful.

Best practice stakeholder attributes when building a Relationship Map are:

- Role
- Influence
- Preference
- Relationship

To build a Relationship Map use your Revegy advanced mapping tool or the area below. ***Click here*** *to see a sample of the Revegy Relationship Map.*

I. Customer Landscape

Whitespace Map

The Whitespace Map allows you to visualize your current solution footprint, identify cross-sell and up-sell opportunities, and see where your competition is entrenched.

Best practice attributes when building a Whitespace Map are:

- Solutions Status
  - Our solution is currently in use
  - Competitor solution in use
  - No solution in use
  - N/A
- Competitor (if specified)
- Estimated value for existing opportunities
- Estimated value for potential future opportunities

*To build a Whitespace Map use your Revegy advanced mapping tool or the area below. **Click here** to see a sample of the Revegy White Space Map.*

I. Customer Landscape

Strategy Alignment Map

A Strategy Alignment Map is a visual representation that documents your customer's key business goals and initiatives, aligns these strategic initiatives with key stakeholders and aligns your capabilities accordingly. This valuable map is a key facilitator for collaborating with your customer and helps you and your organization gain greater credibility, value and further insight into the true business potential of an account.

Best practice attributes when building a Strategy Alignment Map are:

- Type (goals, strategy, etc)
- Summary statement
- Strategy owner (should tie back to a person on the relationship map)
- Your solution that will assist the customer in achieving strategic goals

*To build a Strategy Alignment Map use your Revegy advanced mapping tool or the area below. **Click here** to see a sample of the Revegy Strategy Alignment Map.*

I. Customer Landscape

Project Status

A key component to the Customer Landscape is to document the Project Status of any relevant customer projects that could impact your overall Account Planning.

The key information Revegy recommends you document and keep updated include the following:

Project	Project Type	Owner	Comments

Customer Value Scorecard

The Customer Value Scorecard helps sales teams quickly visualize where to focus time and effort on building overall customer value.

Relationship	
What is the status of our relationship with the client?	
How high in the customer organization is our relationship?	
Perceived Value	
Does the customer see value in our relationship?	
Does the customer see value in our products?	
Does the customer see value in our services?	
Contact	
How often do we meet to review the customer’s strategic objectives? (Annually, Quarterly, Monthly, Never, Other)	
How often do customers contact you with requirements? (Annually, Quarterly, Monthly, Never, Other)	
Satisfaction	
Customer's overall satisfaction with us?	
Customer's satisfaction with our products?	
Customer's satisfaction with our services?	

II. Revenue Snapshot

Financial Information

The key Financial Information that should be collected to build an Account Plan includes:

Revenue last fiscal year	
Revenue this fiscal year	
Revenue growth rate	
Comments	
Net Income last fiscal year	
Net Income this fiscal year	
Net Income growth rate	
Comments	

Revenue Summary

The key Revenue Information that should be collected to build an Account Plan includes:

Solution (or Business Unit)	FY-2	FY-1	Current FY	FY+1	Trend (+/-)

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II. Revenue Snapshot

Spend

The key Spend Information that should be collected to build an Account Plan includes:

Area	Vendor	Amount	Growth Rate	Trend (+/-)	Notes

Won Opportunities

Document opportunities you have won this year and the value of those opportunities.

Opportunity Name	Type	Stage	Value	Close Date	Competitor
Total					

Current Opportunities

Document the active deals/projects for this account that you expect to close this year, including the projected revenue and close dates.

Opportunity Name	Type	Stage	Value	Close Date	Competitor
Total					

II. Revenue Snapshot

Potential/Hypothetical Opportunities

Use information within this plan to determine where there may be additional revenue potential within this account. If you have a revenue goal for this account you should make sure you have enough revenue identified to allow you to achieve your goal.

Opportunity Name	Type	Customer Initiative	Product/ Service	Potential Value	Estimated Close Date	Status
Total						

Opportunity Summary Analysis

Create a summary view of all the opportunities for this account and where you currently are with regard to achieving the revenue goal for this account.

Revenue Goal for this Account	
Total Value of Won Opportunities (from the table above)	
Total Value of Current Opportunities (from the table above)	
Total Value of Potential Opportunities (from the table above)	
Total value of all opportunities	
Gap between revenue goal and value of all opportunities	
% of Goal	

III. Account Goals

Internal Account Plan

Drawing from the landscape and opportunity analysis, document your goals and objectives for the account (short-term and long-term), the primary individual(s) responsible for driving the actions and the date to execute on these goals.

Goal/Objective/Action	Person Responsible	Date Due

Risk/Barriers/Limitations

A critical step in developing an effective plan will be to identify and document risks, barriers or limitations you are facing in an account, your strategies to overcome these obstacles and the primary owner of each.

Risk/Barrier/Limitation	How to overcome?	Person Responsible

IV. Plan Administration

Account Overview

Document and maintain the general information on the account. It is critical that this information is kept current at all times.

Account Name	
Account Owner	
Public/Private	
Annual Revenue	
Customer Since (Year)	
Buying/Licensing Locations	
Number of Employees	
Fiscal Year End	
Company Website	
Address	
Phone	

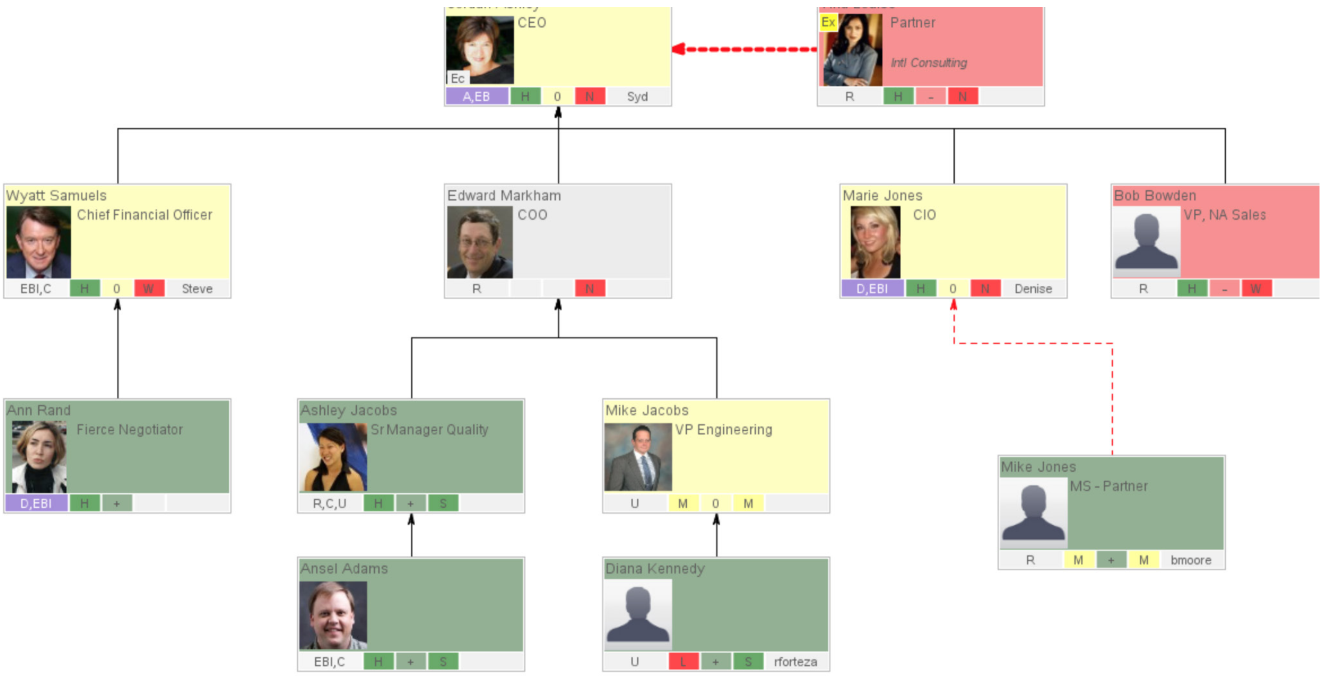
Account Team Information

Document the members of your account team and the primary role each individual is expected to play.

Name	Title	Email	Phone	Role

V. Appendix

Sample Relationship Map



Sample Whitespace Map

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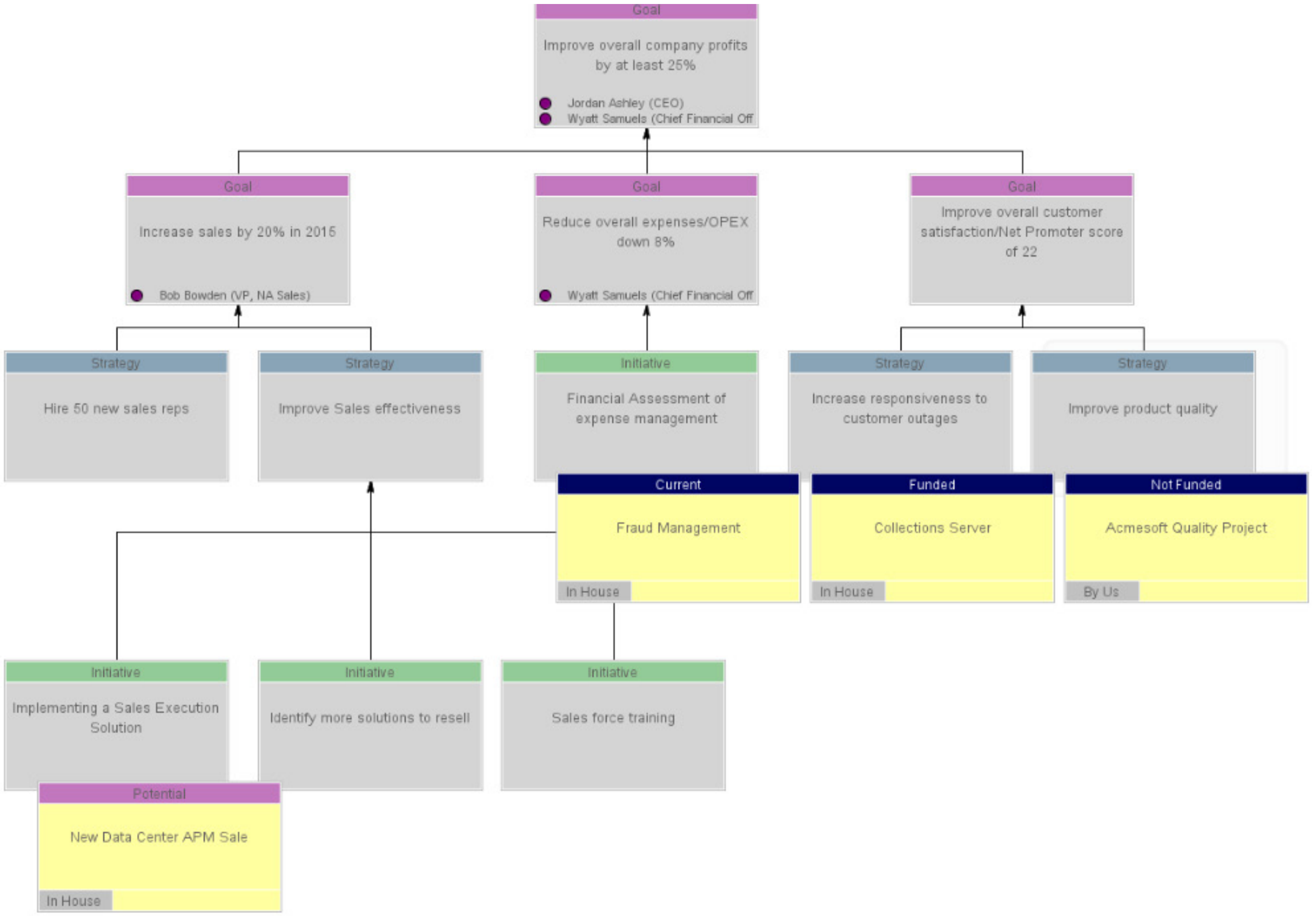
V. Appendix

Sample Strategy Alignment Map



Customer Landscape
Revenue Snapshot
Account Goals
Plan Administration

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Achieve Account Planning Excellence with Revegy

Contact us to schedule a demo of the Revegy sales planning and execution tools today.
Call 404.998.5700 or visit www.revegy.com/contact-us.

About Revegy

Revegy's technology makes sales planning and execution happen – providing process consistency and collaboration across all facets of a sales organization. Using our visual tools sales teams gain efficiencies and sell more strategically. Revegy guides you through every step of the way from account strategy and planning to deal execution. It helps navigate risks, gain competitive advantage and expand opportunities throughout the sales process so you can grow account revenue, win more deals and improve forecast accuracy. Revegy serves B2B sales organizations that have complex sales cycles and our customers include leading organizations such as SAS, Oracle, JDA, Informatica. Ryder, Fiserv, First Data, McAfee, Allscripts, QAD, SAP, mongoDB, Redhat and GE. For more information visit www.revegy.com.

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