Purpose

The purpose of this plan is to provide a balanced and objective framework to enable and support account champions to execute a win.
This a guide only – how this is implemented will vary from business to business – but experience suggests it covers all the bases.

Format and Mechanism

This account plan format is intended to checklist and expose issues so should be followed with a reasonable balance of detail rather than be seen as a clerical exercise. Bullets rather than prose are preferred. Specific plans, criteria and level of detail will vary with the particular account significance and nature.

Structure

The plan structure is as follows:

Part 1	***Introduction***	*What it is and who's in the team*
Part 2	***Management Overview***	*Key account performance metrics*
Part 3	***Client Analysis***	*Business aims and landscape*
Part 4	***Opportunity Analysis***	*Business needs and desires*
Part 5	***Client Organisation & People Analysis***	*Power and dynamics*
Part 6	***Account Strategy***	*What we need to achieve to win*
Part 7	***Account Plan***	*How we will win – tactics, timelines, reviews, etc*
Part 8	***Plan Collateral***	*Working papers, references, etc*

Focus and Process

We need to understand the Client and match our solution and account behaviour to leverage Client business needs in our favour:

Understanding Client Needs & the Opportunity	► ***Defining Our Goals & Organising Our Response***	► ***Process to Execute Win***
Business needs	► *Desired results/opportunity/match*	= *Our call to action/objectives*
Significance – ROI, Market, etc	► *Impact on our business*	= *Why necessary/desirable*
Barriers to Client meeting business needs	► *Where are we under status quo*	= *Can we compete/barriers*
What they need to do	► *What we need to do*	= *Plan to Win*
Needs we can therefore leverage	► *Achievable Goals and Options*	= *Execution - Results*

Key Issue

Facts are more powerful than opinions – if in doubt or don't know, say so and plan to resolve.

Part 1 - Introduction

Client	**(insert name of company)**

Brief description of Client need and own offering to meet

Target Opportunity	

Brief description of Order, Revenue, Profit impact and any strategic imperatives to justify major account status

Business Impact	

Account champions – e.g.:

- *Executive Sponsor*
- *Sales Manager*
- *Account Manager*
- *Operations*
- *Service*
- *Commercial/Legal*
- *Finance*
- *etc*

Account Team	Tel	Email

Version:	**Date:**	**Plan Owner:**

Part 2 - Management Overview

Brief overview: New/ Under Threat/ Cash Cow/ Embedded/ etc

Account Status	

Prospecting – 5%
Qualification – 10%
Discovery/Analysis – 15%
Bid/No Bid – 30%
Compelling Solution – 50%
Agreement to proceed – 90%
Effective Contract – 100%

Opportunity Status/Options	**£k**	**When**	**% Probability**						
			5	10	15	30	50	90	100
Xyz opportunity			x						
Abc option					x				
etc							x		

Score -5 through 0 to +5

Assess based on supporting detail

Key Client Metrics	**Rolling Score**											
Date (mm yy) format -												
Do we understand the Client												
Do they face compelling events/pressures												
Financial condition												
Quality of relationships												
Barriers to entry												

Explain key reasons for improvement/deterioration

Comments	

Score -5 through 0 to +5

Assess based on supporting detail

Key Opportunity Metrics	**Rolling Score**											
Date (mm yy) format -												
Is there an opportunity												
Significance to client												
Is there a budget/funds												
Complexity												
Do we have a competitive advantage												
Is there an opportunity												

Explain key reasons for improvement/deterioration

Comments	

Score -5 through 0 to +5

Assess based on supporting detail

Key Opportunity Metrics	**Rolling Score**											
Date (mm yy) format -												
Strategy in place												
Aligned with Client Business needs												
Benefits identified												
Working with Client												
Working with Partners												
Plan in place												
Plan being executed												
Resource in place and effective												
Organisational support satisfactory												
Contact plan effective												
Overcoming barriers												
SWOT positive												
Campaign budget sufficient												
Investment issues satisfactory												

Explain key reasons for improvement/deterioration

Comments	

Yes or No
Justify/explain key reason

Will we win	

Part 3 - Client Analysis

Brief review of Client and business mission	**Client Overview**	
T/o, Profitability, Sectors, Heads, Locations, etc	**Key Client Facts**	
How do they operate to drive revenue and profit – market share, build to demand, etc Key success drivers Approach to ROI Etc	**Client Business Model**	
Culture, Efficient, Liberal, Rigorous, Informed, Visionary, Partnership. Adversarial, etc	**Client Corporate Personality**	
Open to collaboration, Competitive Bid Process, Levelling, etc	**Client Approach to Vendors**	
Who drives them/do they have dependencies on – Investors, Banks, Govt., Regulator, Alliances, etc Can we leverage or are they a threat	**Client Ecosystem**	
Who do they compete with – direct & indirect Client performance v best practice Emerging new competition	**Client Competitive Pressures**	

How would we see these if we invested in or worked for the Client

Client SWOT	
Strengths	
Weaknesses	
Opportunities	
Threats	

What are they doing & what imperatives & opportunities do they have to improve

Client Change Initiatives & Opportunities	

History/Key Issues
Vendor, Partner or Synergistic
Evidence/qualify perception
Are we in a position to impact, up lift perception

Client Experience/ Perception of our Company	

Comment, Speculation, Parked Issues	

Actions	**Who**	**By When**	**Status**

Part 4 - Opportunity Analysis

What business process does the client want to do differently	**Why is there an Opportunity**	
What is the significance to the Client (quantify money impact), defensive/aggressive strategy, market/business driver, etc	**Reasons for Change**	
Client's "Business Plan" description of project	**What is the Client Project**	
Client Market/Customer Revenue, ROI expectation, etc Financial constraints	**Client's Financial Goals**	
Is there a budget, approval stage, total cost of project and breakdown, associated & displaceable budgets, our potential share of wallet, etc	**Client Budget**	
What issues does the Client face in executing his project: financial, resource, operational, market, complexity, etc	**Client's Barriers**	
Who (company, function, vendor, etc) has primary benefit or loss from project State interest Who can accelerate/hinder	**Key Stakeholders**	
	External to Client	
	Business Benefit	
	Project Delivery	

Direct, indirect and 3rd party beyond immediate opportunity	**Potential for Growth**	
Is there an out of plan proposition that can create value for Client – our share of wallet	**Potential for Innovation**	
Things that can't be proved but seem likely or possible	**Comment, Speculation, Parked Issues**	

Actions	Who	By When	Status

Part 5 - Client Organisation & People Analysis

How does the Client operate his business Who (Sales, Finance, etc) has the power, leads, follows	**Client Organisation**	
Opportunity to move up if a functional decision Is it desirable to do so	**Board or Functional Decision**	
Who, Why Profile/Background Why good or bad for us	**Client Executive Sponsor**	
Who, Why Profile/Background Why good or bad for us	**Client Project Execution Manager**	

Limit total to top 10 to 20 or so – more detailed analysis can be in contact plan

Score from -5 (totally opposed to us) through 0 (no view) to +5 (avid supporter)

Quantify role in terms of significance to decision and parochial benefits to player

Comment on reasons for score & opportunity to change positively, key relationships, etc

External players may range through

Power Players	**Title, Role & Comment**	**Score**
Key Decision Makers		
Key Evaluators		
Key Influencers		
Key Users		
Key Gate Keepers		

Partners, Regulators, Customers, Vendors, etc

Key External Players		

Aligned groups, Factions, Turf Wars, Sensitivities, Preferences, Biases

Political Issues	

Things that can't be proved but seem likely or possible

Comment, Speculation, Parked Issues	

Actions	Who	By When	Status

Part 6 - Account Strategy

Explain how proposition will match or exceed	**Client Business Goals**	
Explain how proposition will enhance or facilitate	**Client Business Process**	
Strategy to avoid competition & lowest price & accelerate win	**Sales Cycle**	
Explain & state why proposition is Unique or Compelling Real - not a "me too"	**Unique or Compelling Selling Point**	
5 or so key Client benefits	**Sales Themes**	
5 or so key features of our proposition that deliver the benefits	**Sales Messages**	
Strategy to embed with Client – move up from basic vendor relationship	**Client Synergy**	
Strategy to leverage Client organisation	**Client Organisation**	
Strategy to leverage supporters & convert/isolate objectors	**Client People**	
Identify & strategy to secure leverage of our proposition Consider "Sell Through", "Sell With", etc, strategies	**3rd Parties**	

Identify who they are & strategy to outperform & outmanoeuvre Focus on their perception of USP, advantages, benefits, features, cost, etc Can we influence Client & requirement to eliminate, disadvantage	**Competitors**	
Relationship strategy & Marcomms	**Comms.**	
Strategy to optimise our benefit/advantage & build barriers to displacement	**Proposition**	
Identify & strategy to negate	**Barriers**	
Identify & strategy to avoid or minimise	**Risks**	
From Client Negotiating Characteristics "Win – Win" concessions, Trades Sell to or shared risk/reward	**Close & Negotiation Strategy**	
Things that can't be proved but seem likely or possible	**Comment, Speculation, Parked Issues**	

Actions	**Who**	**By When**	**Status**

Part 7 - Account Plan

This section deals with account team actions and progress necessary to understand the Client and Opportunity and the internal plan, ownership & responsibilities, progress/confidence, resource, milestones, gaps, barriers, solutions, etc to deliver a win. The left hand column commentary is a high level checklist of the aims and objectives of the plan and achievement required.

Identify significance to us - history – win probability - qualify opportunity v resource investment	**Analyse, Classify & Profile Client**	
Plan to establish & develop – current & future Do we understand Client domain?	**Relationships with Client**	
Capture landscape & drivers Controlled information sharing Accelerants Common language	**Working with Client**	
Capture, model & match Who is "Voice of the Client"? Alternate sources of data Our coverage	**Understand Client Goals**	
Match our account plan & sales process to Client buying cycle	**Sales Cycle Identified**	
Define, set, allocate & develop Short, medium & long term	**Account Team Objectives**	
Leadership & governance Resource & responsibilities Review & reporting calendar Tools	**Account Team Process**	

From Client needs, drivers & SWOT	**Critical Success Factors Identified**	
How would we see ourselves if we worked for the Client	**SWOT**	
	Strengths	
	Weaknesses	
	Opportunities	
	Threats	
From Client needs & drivers	**Strategy Identified**	
Proposition and plan matched to Client needs & drivers	**Client Alignment**	
From Client needs & drivers Piggy back on 3rd parties if/as necessary	**Unique or Compelling Differentiator Identified**	
Compelling to Client	**Benefits Identified**	
Real support to U/CSP & benefits Not from internal publicity	**Sales Themes & Messages Identified**	
Match our team to Client team Players identified and qualified Progressive contact plan	**People Alignment**	
Enjoin to our cause & integrate	**3rd Parties**	

Identify, model & negate	**Competition**	
Identify solution(s) & options *Plan to deliver* *Fill gaps - Investment, 3rd Parties, etc*	**Proposition & Options Identified & Firmed**	
Budget *R&D* *Pilot – Due Diligence*	**Pre Contract Requirements**	
Identify& manage risks	**Risk Register**	
Fit *Issues*	**Technology Issues**	
Fit *Issues*	**Operations Issues**	
Fit *Issues*	**Delivery Issues**	
Profitability *Fit with budget, plan & policy* *Financing, capital, investment requirements* *Unusual issues*	**Financial & Legal Issues**	
Fit with our company goals *Value Chain leverage* *Brand impact*	**Strategic Issues**	
Identify roadblocks & slippage and plan to negate	**Performance Issues**	

Communication, reporting, review, approval & sponsor	**Management Buy In**	
Things that can't be proved but seem likely or possible	**Comment, Speculation, Parked Issues**	

Actions	Who	By When	Status

Part 8 – Collateral

Reference documents, plans, working papers, etc that support this plan

Identify documents and plans associated with the account plan e.g.:

- *Relationship Development & Contact Plan*
- *Opportunity P & L*
- *Risk Register*
- *Sales Cycle map to Client Buying Process*
- *Milestone Plan*
- *Client Business Plan*
- *Joint Client Workshop - ??/??/05*
- *etc*

Source/Owner	Title

Things that can't be proved but seem likely or possible

Comment, Speculation, Parked Issues	

Actions	Who	By When	Status