Focus on the How: Executing on the Account Strategy

SAMA’s Pan-European Conference | 13-15, March 2011 | Paris, France

The Keys to Effective Strategic Account Planning

Steve Andersen
Performance Methods, Inc.
The Keys to Effective Strategic Account Planning: Workshop Agenda

- Kickoff and Introductions
- Strategic Account Planning Overview
- How Do Today’s Customers Define Value?
- Defining the Role of the Strategic Account Manager
- Establishing a Profile for Your Strategic Accounts
- Achieving Customer Alignment Through the Account Planning Process
- Determining Your Account’s Business Landscape
- Implementing Performance Metrics within Your Account Plan
- Balancing the Short and Long-Term Tensions of Account Planning and Opportunity Management
- Identifying and Segmenting Your Sales Opportunities
The Keys to Effective Strategic Account Planning: Workshop Agenda (Cont’d)

- Assessing Your Account Relationships
- Aligning Your Business Objectives with Your Customer’s Business Objectives
- Aligning Your Account Team with Your Customer’s Team
- Positioning Your Solutions and Unique Value
- Differentiating Your Value Through Competitive Strategies
- Building a Value Scorecard for Your Customer
- Developing and Implementing Account Growth Strategies
- Involving Your Customer in the Planning Process
- Benchmarking Your Current Account Planning Process
- Driving the Account Planning Process
- Summary, Wrap-Up and Q&A
## Agenda

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<th>Break</th>
<th>Part 2</th>
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</thead>
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<td><strong>Topics</strong></td>
<td><strong>15 Minutes</strong></td>
<td><strong>Topics</strong></td>
</tr>
<tr>
<td>- Kickoff and Introductions</td>
<td>- Aligning Your Business Objectives with Your Customer's Objectives</td>
<td>- Aligning Your Account Team with the Customer’s Team</td>
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<tr>
<td>- Strategic Account Management Overview</td>
<td>- Communicating Your Value with Customer-Specific Value Propositions</td>
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<td>- How Do Customers Expect Their Suppliers to Create Value for Them?</td>
<td>- Building Your Account Value Scorecard</td>
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<td>- Developing Your Account Growth Strategy</td>
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<td>- Implementing and Executing Your Growth Strategy with Action Plans</td>
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<td>- Introducing the Account Plan</td>
<td>- Involving Your Customer in the Account Planning Process</td>
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<td>- Determining Your Account’s Business Landscape</td>
<td>- Effective Strategic Planning: Who Drives the Process?</td>
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<td>- Implementing Performance Metrics within Your Account Plan</td>
<td>- Summarizing the Keys to Effective Strategic Account Planning</td>
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<td>- Identifying and Segmenting Your Account’s Sales Opportunities</td>
<td>- Workshop Wrap-Up and Q&amp;A</td>
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</tbody>
</table>
What Do We Do for Our Clients?

We Design, Develop and Deploy Customized, Value-Focused Strategic Account Management Processes

Adapt
Strategic Account Teams and Their Customers Assess Value Creation Efforts and Adapt Plans Together

Review
Strategic Account Teams and Their Customers Review and Measure Value Creation Efforts Together

Plan
Strategic Account Teams and Their Customers Develop Plans to Create Value Together

Execute
Strategic Account Teams and Their Customers Implement Plans and Execute Best Practices Together

Customer Defined Value

Management Process™
What Is Strategic Account Management?

Is Strategic Account Management an Art or a Science?

**Science**
- Disciplined
- Predictable
- "Inside-the-Box"
- Execution
- Reality
- Knowledge

**Art**
- Creative
- Expressive
- "Out-of-the-Box"
- Imagination
- Vision
- Skills

What Is Strategic Account Management?
What Is Strategic Account Management?

Please select a customer that you will use in completing the exercises in today’s workshop

Strategic Account: __________________________
Individual Contact: ________________________

Workshop Exercise Output

1. My Customer understands and acknowledges the value that my Company has created and continues to create for them.  
   Yes  No

2. If asked by others within their organization, my Customer could clearly articulate my Company’s value to their business.  
   Yes  No

3. My personal success is important to my Customer and their actions demonstrate this.  
   Yes  No

4. My Customer is loyal to my Company and this is also demonstrated through their actions.  
   Yes  No

5. I am able to build upon my relationship with this Customer to cross-sell additional business.  
   Yes  No

6. This Customer is strategic to my business and they consider my Company to be just as strategic to their business.  
   Yes  No
Strategic Account Planning Overview

How Has the Interest in Account Business Planning Evolved in Recent Years?

- ~1990: not a major topic/it was all about opportunities…
- ~1995: very few companies were seriously interested…
- ~2000: some companies interested/few were committed…
- ~2005: more companies were interested but many were selling too much too quickly to really care…
- 2011: most companies are seriously interested in deploying a SAM Program and many that haven’t feel competitively exposed and at risk
The Changing Reality of Client Expectations

The “Voice of the Customer”

- We expect our suppliers to listen when we describe our needs and to do so before discussing the merits of their products.

- We are told by some suppliers that we are a “strategic account” for them – hence we expect them to be available even when we are not buying something from them.

- We hear that some of our suppliers have “plans” for us and we would like to know what they have in mind and seek our input.

- We expect our suppliers to make it their business to understand our business – they can’t solve our problems if they don’t understand them.

- We expect our strategic suppliers to act on our behalf – otherwise they are “vendors” and we treat them as such.
What Are the Keys to Effective Strategic Account Planning?

1. Discover What the Customer Values Most and Validate
2. Define “What Is a Strategic Account?” and Assess Ongoing Fit
3. Establish Performance Metrics to Measure and Track SAM Execution
4. Integrate and Balance the Account and Opportunity Planning Processes
5. Assess and Strengthen the Account’s Most Strategic Relationships
6. Align the Supplier’s Objectives with the Objectives of the Customer
7. Position and Differentiate Supplier’s Unique Value with the Customer
8. Develop and Implement a Proactive Strategy to Grow the Account
9. Engage the Customer in the Account Planning Process
10. Provide Coaching and Sponsorship to Account Teams as Needed

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What Are the Keys to Effective Strategic Account Planning?

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How Do Today’s Strategic Customers Define Value?
How Do Today’s Strategic Customers Define Value?

Workshop Exercise

Using the lists on the previous slide, please indicate the “Top 4” types of Supplier Value that you believe that your selected account expects of you and your organization.

Key #1

Continued
The Role of the Strategic Account Manager in Account Planning

Workshop Question?

Please Describe the Value That You Bring to Your Strategic Customers.
The Role of the Strategic Account Manager in Account Planning

- Understand the Customer’s business and priorities
- Position and Sell “High and Wide” Throughout the Customer’s Org.
- Provide advice and problem solving to the Customer
- Conduct internal account planning sessions with their Account Team
- Provide coaching and leadership to their Account Team
- Engage the Customer in the account planning process
- Leverage the value and expertise of their “Entire Company”
- Coordinate resources to present “One Face to the Customer”
- Build long-term Customer relationships while meeting short-term revenue objectives
- Ambassador, Strategist, Negotiator

Company Solutions, Resources & Expertise

Account Team Knowledge & Skills

Internal Planning with Account Teams

External Planning with Customers

Teamwork & Communication
The Role of the Strategic Account Manager in Account Planning

- Understand the Customer’s business and priorities
- Position and Sell “High and Wide” Throughout the Customer’s Org.
- Provide advice and problem solving to the Customer
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- Build long-term Customer relationships while meeting short-term revenue objectives
- Ambassador, Strategist, Negotiator
# The Role of the SAM: A Profile for “Next Level” Success

<table>
<thead>
<tr>
<th>Knowledge</th>
<th>Skills and Abilities</th>
<th>Attributes</th>
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<tbody>
<tr>
<td>Customer’s Business</td>
<td>Consultative</td>
<td>Trust</td>
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<td>Customer’s Industry</td>
<td>Business Problem Solving</td>
<td>Credibility</td>
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<td>Customer’s Customers</td>
<td>Communication &amp; Presentation</td>
<td>Relationship Oriented</td>
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<td>Customer’s Competitors</td>
<td>Leadership</td>
<td>Integrity</td>
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<td>Customer’s Account History</td>
<td>Coaching</td>
<td>Customer Focus</td>
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<td>Customer’s Culture</td>
<td>Collaborative</td>
<td>Business Judgment</td>
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<td>Customer’s Bus. Processes</td>
<td>Strategic Thinking</td>
<td>Business Acumen</td>
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<tr>
<td>Supplier’s Company</td>
<td>Discovery</td>
<td>Team Oriented</td>
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<td>Supplier’s Solutions</td>
<td>Conflict Management</td>
<td>Goal Oriented</td>
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<tr>
<td>Supplier’s Bus. Processes</td>
<td>Negotiation: Internal &amp; External</td>
<td>Results Oriented</td>
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<td>Supplier’s Industry</td>
<td>Alignment: Internal &amp; External</td>
<td>Action Oriented</td>
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<td>Supplier’s Partners</td>
<td>Positioning</td>
<td>Attention to Detail</td>
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<td>Supplier’s Competition</td>
<td>Executive Level Selling</td>
<td>Proactive vs. Reactive</td>
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<td>Supplier’s Unique Value</td>
<td>Planning</td>
<td>Competitive</td>
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</tbody>
</table>

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The Role of the Strategic Account Manager in Account Planning

Workshop Exercise

1. Using the list on the previous slide, please select 2 important areas of Knowledge that you want to extend over the next 12 months.

2. Using the list on the previous page, select 2 important areas of Skills and Abilities that you want to expand over the next 12 months.

Note: If you are an Account Manager, please answer for yourself, individually. If you are a Manager of Account Managers, please answer from the perspective of the SAMs on your team.
### Strategic Account Profile and Benchmarking Tool

<table>
<thead>
<tr>
<th>Category</th>
<th>Ranking</th>
<th>Very Unfavorable Position</th>
<th>Unfavorable Position</th>
<th>Neutral Position</th>
<th>Favorable Position</th>
<th>Very Favorable Position</th>
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<td>V</td>
<td>Attractiveness of Customer’s Market</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>V</td>
<td>Supplier’s Share of Customer’s Spend</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>V</td>
<td>Opportunity to Share Best Practices</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
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<tr>
<td>A</td>
<td>Product/Solution Fit with Customer Need</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
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<tr>
<td>A</td>
<td>Supplier’s Competitive Position (Mindshare)</td>
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<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
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<tr>
<td>A</td>
<td>Customer’s Buying/Purchasing Strategy</td>
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<td>X</td>
<td>X</td>
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<tr>
<td>R</td>
<td>Customer’s Willingness to Partner</td>
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<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>R</td>
<td>Relationship Depth and Breadth</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>R</td>
<td>Customer Executive Sponsor(s) in Place</td>
<td>X</td>
<td>X</td>
<td>X</td>
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<td>X</td>
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<tr>
<td>G</td>
<td>Opportunity for Revenue Growth</td>
<td>X</td>
<td>X</td>
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<td>X</td>
</tr>
<tr>
<td>G</td>
<td>Opportunity for Increased Profitability</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
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<tr>
<td>G</td>
<td>Future Growth Potential</td>
<td>X</td>
<td>X</td>
<td>X</td>
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<td>X</td>
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</table>

**Legend:**
- V = Value
- A = Alignment
- R = Relationship
- G = Growth

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Establishing a Profile for Your Strategic Accounts

Workshop Exercise

Using the criteria on the previous slide, please benchmark your selected account in each of the categories contained in the Strategic Account Profile.

Circle the “X” that best describes your current position.

Key #2
## Customers’ Definitions of Supplier Value

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<table>
<thead>
<tr>
<th></th>
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</thead>
<tbody>
<tr>
<td>1.</td>
<td>Ease of Doing Business with Supplier</td>
</tr>
<tr>
<td>2.</td>
<td>Problem and Conflict Resolution</td>
</tr>
<tr>
<td>3.</td>
<td>Supplier Knows Our Business and Our Industry</td>
</tr>
<tr>
<td>4.</td>
<td>Supplier Listens to Our Needs</td>
</tr>
<tr>
<td>5.</td>
<td>Supplier Solves Our Business Problems</td>
</tr>
<tr>
<td>6.</td>
<td>Supplier Resources Dedicated to Our Account</td>
</tr>
<tr>
<td>7.</td>
<td>Preferred Pricing and Contracting</td>
</tr>
<tr>
<td>8.</td>
<td>Supplier Plans Proactively with Us</td>
</tr>
<tr>
<td>9.</td>
<td>Strategic vs. Transaction Orientation by Supplier</td>
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<tr>
<td>10.</td>
<td>Team-to-Team Relationships with the Supplier</td>
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<td>11.</td>
<td>Executive-Level Relationships with the Supplier</td>
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<td>12.</td>
<td>Clear Understanding of Specific Value to Be Delivered to Us</td>
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<tr>
<td>13.</td>
<td>Assessment of Performance Via Defined Set of Metrics</td>
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<td>14.</td>
<td>Supplier’s Third Party Partnerships</td>
</tr>
<tr>
<td>15.</td>
<td>Single Point of Contact for Strategy and Decisions</td>
</tr>
<tr>
<td>16.</td>
<td>Supplier Provides an Internal Advocate for Us</td>
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## The Strategic Account Profile

### Table: Category Ranking

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<td>X</td>
<td>X</td>
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</table>
Internal Alignment With Your Account Team

1. Proactive Engagement
   ■ Not driven by service problems or sales opportunities

2. Resource Deployment
   ■ Helping Customers gain timely access to key resources

3. Relationship Building
   ■ Building increased levels of trust and credibility for you and your organization

4. Process Execution
   ■ Utilizing key skills and teamwork

5. Joint Planning
   ■ Collaborating with the Customer on achieving their business objectives and addressing their internal challenges

6. Value Creation
   ■ Ensuring that our efforts are focused on Customer value

MyCo

Strategic Account Team
Strategic Account Team:
Organization and Structure

MyCo Strategic Account Manager

MyCo Business Developer(s)

MyCo Subject Matter Experts

MyCo Customer Service

MyCo Finance and Legal

MyCo R&D and Operations

Strategic Account Team

MyCo Senior Leadership

MyCo Sales Leadership

MyCo Executive Sponsor

MyCo Partners and Affiliates

Parent Company Resources

Other?
**Alignment:** The process through which account managers connect their organization’s objectives with those of the Customer, integrate their resources with the Customer’s team, and build relationships that are based on credibility, trust and value creation.
Aligning with the Customer Through the Account Planning Process

Our Primary Tool to Ensure Effective Customer Alignment!

PMI Strategic Account Management Program
Strategic Account Plan

Customer Name:
Strategic Account Manager:
Account Team Members:
Sales Manager/Executive Sponsor:
Account Plan Revision Date:

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   b. Account Team        | 1
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3. Account Relationship  | 5
4. Account Organization
   a. Account Structure   | 5
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6. Account Growth Strategy | 9
7. Account Action Plan   | 10

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Introducing the Strategic Account Plan Template

Account Plan Contents

1. Account Information
   a. Customer Background
   b. Account Team
   c. Business Landscape
   d. Account Metrics

2. Summary of Opportunities

3. Account Relationship Assessment

4. Account Organization
   a. Account Structure
   b. Individual Relationships
   c. Team-to-Team Alignment

5. Account Value Scorecard

6. Account Growth Strategy

7. Account Action Plan
# Strategic Account Plan/Section 1: Background and Account Team

## Section 1

### a. Customer Background
- Annual Investment and Spend
- Business Overview
- Recent History
- Issues, Concerns, Challenges
- The “Top 5’s”
  - Customer’s Providers, Customers, Competitors
- Recent Sales Opportunities
  - Outcome and Competitor

### b. Account Team
- Name/Title/Role
- Value to Customer Rel’ship

### 1. Account Information

#### a. Customer Background

<table>
<thead>
<tr>
<th>Customer’s Name and Address</th>
<th>Customer’s Current Annual Investment in the Types of Products and Services Offered by MyCo</th>
<th>Customer’s Current Annual Spend with MyCo</th>
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**Overview of the Customer’s Business**
(Identify the Customer’s primary products/services and target markets, as well as their primary business challenges. Are they currently in growth mode or are they capital constrained?)

**MyCo’s Recent History with the Customer**
(Describe MyCo’s recent history with the Customer, including any recent opportunities and projects - whether MyCo won or lost.)

**Issues, Concerns and Challenges**
(Describe any specific issues, concerns and challenges that your Account Team has experienced in serving this Customer, creating value for them and growing our relationships with them.)

<table>
<thead>
<tr>
<th>Customer’s Top 5 Preferred Providers That Serve MyCo’s Market</th>
<th>Customer’s Top 5 Customers</th>
<th>Customer’s Top 5 Competitors</th>
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<tbody>
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<td>1.</td>
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<thead>
<tr>
<th>MyCo’s Most Recent Sales Opportunities</th>
<th>Outcome of Each Opportunity (Business Won/Lost?)</th>
<th>Primary Competitor for Each Opportunity</th>
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<td>1.</td>
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</tbody>
</table>

### b. MyCo Account Team

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Team Role</th>
<th>Value to the Customer Relationship</th>
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<td>1.</td>
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<td>6.</td>
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<td>7.</td>
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<td>8.</td>
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</tbody>
</table>
Determining Your Strategic Account’s Business Landscape

Business Landscape

- **Typically a 2-Year Perspective**
  - Last Year, This Year (Possibly Next Year, Depending…)
  - What Is MyCo Potential within This Strategic Account?

- **Analyze Your Customer’s Organization**
  - How Are They Structured to Do Business?

- **Determine Where MyCo May Have Opportunities**
  - Where Can MyCo Create Value for This Strategic Customer?
  - Who Are Our Primary Competitors?

- **Define How MyCo Will Create Customer Value**
  - Which MyCo Solutions and Services Are Needed?
Determining Your Strategic Account’s Business Landscape

### Account Business Landscape

<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>Customer ‘Corporate Level’</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Customer Subsidiary/Dept. Business Unit #1</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Customer Subsidiary/Dept. Business Unit #2</td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Customer Subsidiary/Dept. Business Unit #3</td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Customer Subsidiary/Dept. Business Unit #4</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Customer Subsidiary/Dept. Business Unit #5</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Legend:**
- ○ Weak Revenue Production
- ○○ Moderate Revenue Production
- ○○○ Strong Revenue Production
c. Business Landscape

- Provides a View of the Customer’s Org. by Subsidiary/Business Unit
- Maps MyCo’s Solutions, Product Lines and Services to Customer’s Organization
- Identifies MyCo’s Primary Competitors
- Indicates Revenue for Current and Previous Year by Customer Sub/BU
  - 2009, 2010 and 2011
  - Weak, Moderate or Strong

<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>Customer 'Corporate Level'</td>
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<td></td>
</tr>
<tr>
<td>Customer Subsidiary/ Business Unit #1</td>
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<td></td>
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<tr>
<td>Customer Subsidiary/ Business Unit #2</td>
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<td></td>
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<tr>
<td>Customer Subsidiary/ Business Unit #3</td>
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<tr>
<td>Customer Subsidiary/ Business Unit #4</td>
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<tr>
<td>Customer Subsidiary/ Business Unit #5</td>
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<tr>
<td>Customer Subsidiary/ Business Unit #6</td>
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<tr>
<td>Customer Subsidiary/ Business Unit #7</td>
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<td></td>
</tr>
<tr>
<td>Customer Subsidiary/ Business Unit #8</td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

1. Customer 'Corporate Level': Describe MyCo’s business with this Customer at the corporate level
2. Customer Subsidiary/Business Unit: Describe where business exists that is specific to Customer subsidiaries/business units
3. Revenue: Revenue refers to the Customer’s total spend with MyCo (broken out by corporate level spend as well as at the subsidiary/business unit level), including any and all applicable sources of revenue
4. Legend: Weak: revenue prediction from this Customer Subsidiary/BU during this time period=

   Moderate revenue production from this Customer Subsidiary/BU during this time period=

   Strong revenue production/spend from this Customer Subsidiary/BU during this time period=
Section 1

d. Account Metrics

- Financial Performance
- Operational Performance
- Account Growth Performance
- Cust.-Facing Performance
- Account Planning Performance
- TBD by Local Management
- Ratings Levels
  - Excellent, Good, Fair, Poor
- Timeframes
  - 2009, 2010 and 2011
Strategic Account Plan/Section 1: Account Metrics

Financial Performance
- Achievement of YTD Revenue Target
- Account Profitability/Gross Margin
- Outstanding Customer Accounts Receivable

Examples

Operational Performance
- Customer Orders Shipped on Time and Complete
- Reporting and Invoicing/Accurate and On-Time
- Customer Satisfaction and Quality Scores

Account Growth Performance
- Account Penetration: # of Customer BU’s/Divisions
- Market Share or % of Customer Spend
- Competitive Win Rate (%) vs. Competition

Customer-Facing Performance
- Growth of MyCo’s Network of Sponsors and Supporters
- Customer’s Acknowledgement of MyCo’s Unique Value
- Customer’s Willingness to Provide References

Account Planning Performance
- Effective Deployment of MyCo’s Resources
- Strategic Account Plan Updated and Complete
- Effective Team Communication via Regular Meetings
Implementing Performance Metrics to Measure SAM Execution and Value

Workshop Exercise

Using the 5 “Strategic Performance Categories” in Account Metrics, please assess your account team’s current results in each category for your selected account.

Then circle the “Strategic Performance Category” that represents the most significant challenge to your success.

Please be prepared to discuss with the group.

Key #3
Balancing the Short and Long-Term Tensions of SAM and Sales

Do the Account and Opportunity Management Processes Ever Seem to Be in Conflict with Each Other?
Balancing the Short and Long-Term Tensions of SAM and Sales

Sales Opportunity #1

Account Plan

Sales Opportunity #2

Sales Opportunity #3
# Section 2

## Summary of Opportunities

- **Opportunity Name**
- **Customer Business Unit**
  - **Description**
  - **Amount**
- **Customer’s Business Objectives and Internal Challenges That Are Related to This Opportunity**
- **Key Evaluation Criteria**
- **Proposed MyCo Solution**
- **Targeted Close Date**
- **MyCo Competitors**
Using Section 2 of the Strategic Account Plan, please identify one Sales Opportunity that you are currently working on within your selected account.

Do you know what the Customer’s Business Objectives and Internal Challenges are that relate to this Opportunity?

Do you understand the Customer’s Key Evaluation Criteria for this Opportunity? Please provide 1 example of each.
Segmenting Your Strategic Account’s Sales Opportunities

To segment MyCo sales opportunities for our Strategic Account, we must map our Solutions, Products and Services to the Customer’s Business (Subsidiary/Business Unit).

<table>
<thead>
<tr>
<th>Future/Longer-Term Revenue</th>
<th>Current/Near-Term Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low</td>
<td>Low</td>
</tr>
<tr>
<td>“Track” (Low Current $ &amp; Low Future $ Potential)</td>
<td>Invest Little Time</td>
</tr>
<tr>
<td>“Maintain” (High Current $ but Low Future $ Potential)</td>
<td>Manage &amp; Stay Close</td>
</tr>
<tr>
<td>High</td>
<td>High</td>
</tr>
<tr>
<td>“Grow” (Low Current $ but High Future $ Potential)</td>
<td>Develop &amp; Expand</td>
</tr>
<tr>
<td>“Focus” (High Current $ &amp; High Future $ Potential)</td>
<td>Pursue Aggressively</td>
</tr>
</tbody>
</table>

Customer Subsidiary or Business Unit

MyCo Solution, Product or Service

Potential Revenue

Target Date
Where would you place your selected Opportunity on the segmentation chart?
Assessing and Strengthening Your Strategic Account Relationships

- **Vendor Status**
  - “Reactive”

- **Preferred Supplier Status**
  - “Tactical”

- **Planning Partner Status**
  - “Proactive”

- **Trusted Advisor Status**
  - “Strategic”

- **Customer**
  - “Essential”
    - Must Do Business with Us
  - “Necessary”
    - Needs to Do Business with Us
  - “Important”
    - Wants to Do Business with Us
  - “Convenient”
    - Does Business with Us
The Account Relationship Assessment Worksheet

<table>
<thead>
<tr>
<th>Status</th>
<th>Characteristics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trusted Advisor</td>
<td>The new business default is “Why Not MyCo?”</td>
</tr>
<tr>
<td></td>
<td>Joint planning and strategy meetings occur regularly between our account team and the Customer’s team and result in joint action plans to which both parties are committed</td>
</tr>
<tr>
<td></td>
<td>The Customer routinely consults with us on matters regarding Customer growth and go-to-market strategy</td>
</tr>
<tr>
<td></td>
<td>Ongoing executive level access is in place, and there is a Customer executive that understands and is committed to our value and value propositions</td>
</tr>
<tr>
<td>Planning Partner</td>
<td>Some new business is now non-competitive, and we typically know about new opportunities before our competitors</td>
</tr>
<tr>
<td></td>
<td>We know more about the Customer’s plans for our competitors than the competitors know about the Customer’s plans for us</td>
</tr>
<tr>
<td></td>
<td>The Customer routinely consults with us on matters regarding their external drivers and business objectives</td>
</tr>
<tr>
<td></td>
<td>Customer senior management access is readily available, and there is acknowledgement of our value and value propositions</td>
</tr>
<tr>
<td>Preferred Supplier</td>
<td>Most new business is still competitive, but we are sometimes aware of new opportunities before our competitors</td>
</tr>
<tr>
<td></td>
<td>We understand the Customer’s priorities, but have little influence upon them</td>
</tr>
<tr>
<td></td>
<td>There is some Customer participation in developing our Account Plan, but they feel little equity in it afterwards</td>
</tr>
<tr>
<td></td>
<td>Some management level access is established, but these relationships are not strong and leveragable by us</td>
</tr>
<tr>
<td>Vendor</td>
<td>Practically all new business with the Customer is competitive, and we frequently start in a deficit position</td>
</tr>
<tr>
<td></td>
<td>Our primary Customer contacts are unable to articulate clearly the value they receive through their relationship with us</td>
</tr>
<tr>
<td></td>
<td>Contact is typically initiated by the Customer and is characterized by their demands, generally when something is “wrong”</td>
</tr>
<tr>
<td></td>
<td>Our Account Team has little or no executive level access, and we don’t understand the Customer’s organization or their business strategy</td>
</tr>
</tbody>
</table>

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Using the worksheet on the previous page, please assess your current relationship with your selected account.

Are you “in between” relationship levels?

What can you do to advance your account to the next relationship level?
Assessing and Strengthening Your Strategic Account Relationships

Section 3

Account Relationship Assessment
- Vendor
- Preferred Supplier
- Planning Partner
- Trusted Advisor
- Relationship Status Determined Periodically
- Assessment Date Recorded to Indicate Change Over Time
### Aligning the Business Objectives of Suppliers and Their Customers

<table>
<thead>
<tr>
<th>Customers</th>
<th>Suppliers</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Maximize the value of what we have already purchased.</td>
<td>1. Increase the loyalty of our customers.</td>
</tr>
<tr>
<td>2. Broaden our relationships with key suppliers.</td>
<td>2. Sell “higher and wider” to our customers.</td>
</tr>
<tr>
<td>3. Align with our suppliers’ organizations to make it easier to do business.</td>
<td>3. Utilize our company resources more efficiently and with less redundancy.</td>
</tr>
<tr>
<td>4. Focus our suppliers on our needs vs. their products.</td>
<td>4. Transition our sales people from product to consultative sellers.</td>
</tr>
<tr>
<td>5. Reduce our costs of doing business.</td>
<td>5. Reduce our costs of doing business.</td>
</tr>
</tbody>
</table>

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### Assessing Your Readiness to Align Objectives with the Customer

<table>
<thead>
<tr>
<th>Focus</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Solutions</td>
<td>✗ We are willing to focus our selling efforts on solving our customers’ problems.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>✗ We will listen to our customers’ needs before discussing the merits of our products.</td>
<td></td>
</tr>
<tr>
<td>Consultative Relationships</td>
<td>✗ We want to establish consultative relationships with our customers by understanding their business needs.</td>
<td></td>
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<tr>
<td></td>
<td>✗ We will be available to our customers even when there is no immediate sales opportunity.</td>
<td></td>
</tr>
<tr>
<td>Collaborative Planning</td>
<td>✗ We are interested in planning collaboratively with our customers.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>✗ We would welcome the opportunity to engage with our customers to ensure that we have realistic account and opportunity plans.</td>
<td></td>
</tr>
<tr>
<td>Customer-Specific Value Propositions</td>
<td>✗ We are committed to understanding our customers’ external drivers, business objectives and internal challenges.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>✗ We intend to match our products, solutions and value to these drivers, objectives and issues in ways that can be measured.</td>
<td></td>
</tr>
<tr>
<td>Account Relationship Assessment</td>
<td>✗ We will ensure that we always understand the state of our relationships with our customers.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>✗ We will conduct ongoing assessments of our customer relationships with an intent to ultimately become a “planning partner” or even a “trusted advisor” to them.</td>
<td></td>
</tr>
</tbody>
</table>
Using the worksheet on the preceding page and keeping your selected account (as well as other customers) in mind, please answer each group of questions, organized by category:

- Solutions Focus
- Consultative Relationships
- Collaborative Planning
- Customer-Specific Value Propositions
- Account Relationship Assessment
Account Structure: How Is the Customer Organized?

Section 4:

a. Account Structure

- Business-Level Analysis Rather Than Individual-Level Analysis
- How Is the Customer Structured to Do Business?
- What Are the Customer’s Major Subsidiaries and Key Business Units?
b. Individual Relationships

- Individual Analysis
- Decision Orientation
  - Approver, Decision-Maker, Recommender, Influencer, Other
- Individual Relationship
  - Sponsor, Supporter, Neutral, Competition
- Focus and Role
  - Executive, Financial, Operational, Eng., Technical, Other
Section 4

c. Team-to-Team Alignment

- Name and Title, by Department/BU
- Establishes Professional Drivers for Each
  - “Needs”
- Establishes Personal Drivers for Each
  - “Wants”
- Establishes MyCo Account Team Alignment Contacts
  - How Can We Grow This Relationship?
Aligning Your Account Team with the Customer’s Team

How do executives, managers and individual contributors differ in the ways in which they buy?

Senior Executive
- “Wants and Needs”
- “How Is the Company Doing?”

Middle Management
- “Wants and Needs”
- “How Is the Department Doing?”

Project Team/Individual Contributors
- “Wants and Needs”
- “How Is the Project Doing?”
Let’s review Sections 4b and 4c (Individual Relationships/Team-to-Team Alignment) of the Strategic Account Plan.

This component of the Strategic Account Plan is designed to connect the key members of the Customer’s team with you and your account team.

For your selected Account, please choose 1 individual on the Customer’s team, and work them through the analysis of Sections 4b and 4c.
# Strategic Account Plan/Section 4: Account Organization

## Key Customer Individual

**Name:**

**Title:**

## Critical Business Objectives

1. 
2. 
3. 

## Decision Orientation

- Approver, Decision-Maker, Recommender, Influencer, Other

## Individual Relationship

- Sponsor, Supporter, Neutral, Supports Competition, Sponsors Competition

## Focus/Role

- Executive, Financial, Operational, Engineering, Technical, Other

## Professional Drivers “Needs”

1. 
2. 
3. 

## Personal Drivers “Wants”

1. 
2. 
3. 

## Account Team Alignment Contacts

1. 
2. 
3. 

---

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Positioning Supplier Solutions and Differentiating Your Unique Value

7-Step Process for Building a Customer-Specific Value Proposition

1. Begins with a Focus on the Customer’s Drivers, Objectives and Challenges
2.
3.

Selects and Connects the Appropriate Supplier Solution to the Customer’s Needs

4.
5.
6.
7.

Addresses Supplier’s Advantages, Successes and Unique Value
## Developing Customer-Specific Value Propositions

<table>
<thead>
<tr>
<th>Step</th>
<th>Question</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Customer’s External Drivers</td>
<td>What are the external market factors that are impacting the Customer’s business?</td>
</tr>
<tr>
<td>2. Customer’s Business Objectives</td>
<td>What is the Customer doing to address these External Drivers?</td>
</tr>
<tr>
<td>3. Customer’s Internal Challenges</td>
<td>What could prevent the Customer from meeting their Business Objectives?</td>
</tr>
<tr>
<td>4. MyCo’s Solutions</td>
<td>How will MyCo work together with the Customer to resolve their Internal Challenges?</td>
</tr>
<tr>
<td>5. MyCo’s Advantages</td>
<td>How is MyCo different from our competition in solving these Internal Challenges?</td>
</tr>
<tr>
<td>6. MyCo’s References</td>
<td>Which other Customers has MyCo helped solve similar Internal Challenges?</td>
</tr>
<tr>
<td>7. MyCo’s Unique Value</td>
<td>How does MyCo’s Solution address the Customer’s needs and deliver Unique Value?</td>
</tr>
</tbody>
</table>
1. Customer’s External Drivers

**Definition:** What are the external market factors and pressures that are impacting the Customer’s business?

**Purpose:** To establish credibility by demonstrating knowledge of the Customer’s business

- Competition
- Government
- Regulation
- Customers
- Economy
- Technology
- Shareholders
2. Customer’s Business Objectives

**Definition:** What is the Customer doing to address these Industry Drivers?

**Purpose:** To align with the Customer’s Business Objectives

**Revenue Generating Objectives**
- Improve Customer Service
- Launch New Products or Services

**Cost Optimizing Objectives**
- Consolidate Suppliers
- Implement Productivity-Enhancing Technology

What About Risk Reduction as a Business Objective?

Revenue - Cost
Definition: What could prevent the Customer from meeting their Business Objectives?

Purpose: To discover Customer needs, challenges, obstacles and roadblocks, uncovering potential areas of value
Positioning Supplier Solutions and Differentiating Your Unique Value

How does MyCo’s solution address the Customer’s needs and deliver unique value?

- **Supplier’s Products**
  - The configurations of Products that solve Customer problems

- **Supplier’s Resources**
  - The People, Partners, Technology and Infrastructure that engage with the Customer

- **Supplier’s Expertise**
  - The Knowledge, Skills and Experience that are transferred to the Customer

- **Supplier’s Services**
  - The value-added Services that solve Customer problems and create Customer value

- **Supplier’s Brand and Reputation**
  - The Supplier’s Reputation, Corporate Image and Proven Track Record of Success that can provide assurance to the Customer and reduce their risk
Using the table provided on the next slide, please assess (on a scale of 1-5 for each category) the importance of each of the value categories from the perspective of your Customer for your selected Opportunity.

Indicate for your primary competitor within the account whether this value category represents a value advantage or disadvantage for you, as well as for them.
### Assessing the Importance of Value Categories to the Customer and Our Relative Strengths for Each

<table>
<thead>
<tr>
<th>Value Category</th>
<th>Importance to Customer (Scale of 1-5)</th>
<th>Advantage/Disadvantage for You</th>
<th>Advantage/Disadvantage for Competitor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Products</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Resources</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Expertise</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Services</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Brand and Reputation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Ex: Expertise</strong></td>
<td>4</td>
<td>Advantage</td>
<td>Disadvantage</td>
</tr>
</tbody>
</table>

*PMI*
Account Value Scorecard

- Summary of External Drivers
  - What Are the Market Factors That Have Driven Customer Change?
- Summary of Business Objectives
  - What Has the Customer Done to Address Their External Drivers?
- Summary of Internal Challenges
  - What Have Been the Obstacles or Challenges to Customer Change?
- MyCo’s Solutions
  - How Has MyCo Worked with the Customer to Help Them Change?
- MyCo’s Value
  - How Has MyCo Created Unique, Differentiable Customer Value?
What Is a Growth Strategy?

A proactive plan to grow our business and relationship with a Customer by focusing on specific Customer objectives and partnering with the appropriate Customer team members to ensure that their objectives are met and that Customer value is created.

Developing and Implementing Your Account Growth Strategy

Section 6

Account Growth Strategy

- **Relationship Strategy**
  - How will you grow your relationship with this Customer?

- **Aligning Objectives**
  - What is your potential to align with this individual’s business objectives?
  - What is the potential future revenue associated with this alignment?
  - Why should they care? What is the potential value to them of aligning with your growth objective?
### Developing and Implementing Your Account Growth Strategy

**Name:** __________________________

**Title:** __________________________

**Key Customer Individual**

<table>
<thead>
<tr>
<th>Decision Orientation</th>
<th>Individual Relationship</th>
<th>Focus/Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approver, Decision-Maker, Recommender, Influencer, Other</td>
<td>Sponsor, Supporter, Neutral, Supports Competition, Sponsors Competition</td>
<td>Executive, Financial, Operational, Engineering, Technical, Other</td>
</tr>
</tbody>
</table>

**Professional Drivers “Needs”**

**Personal Drivers “Wants”**

**MyCo Growth/Alignment Strategy**

- Leverage/Expand,
- Develop/ Build,
- Diffuse/Neutralize

**MyCo Potential Opportunity**

**Potential Value to Customer**

<table>
<thead>
<tr>
<th>Critical Business Objectives</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. ________________________</td>
</tr>
<tr>
<td>2. ________________________</td>
</tr>
<tr>
<td>3. ________________________</td>
</tr>
</tbody>
</table>

**To This Individual/To Their Organization**

1. ________________________
2. ________________________

**MyCo Account Team Alignment Contacts**

**Name:** __________________________

**Title:** __________________________

**Approver, Decision-Maker, Recommender, Influencer, Other**

**Executive, Financial, Operational, Engineering, Technical, Other**

**Sponsor, Supporter, Neutral, Supports Competition, Sponsors Competition**

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Let’s review Section 6 of the Strategic Account Plan (Account Growth Strategy).

This component of the Strategic Account Plan is designed to implement a relationship-driven strategy to grow your business by developing and leveraging your individual relationships with key Customer Team members.

For the individual that you selected previously, please complete your Account Growth Strategy.
**Taking Action**

**Action Planning Model**

**Goal**

- What value can we create for the Customer?
- How will we grow our Customer relationships?
- Where will we apply resources to create value for the Customer?
- What can keep us from expanding the relationship?
- Who is accountable for ensuring that we execute?

**Tactic**

- What do we need to do to ensure that we are successful?
- Who is accountable for ensuring that we execute?

**Obstacle?**

- Obstacle ?
- Obstacle ?
- Obstacle ?
### Section 7: Account Action Plan

- **Goals**
  - How will we create value in this account?

- **Obstacles**
  - What can prevent us from growing our Customer relationships?

- **Tactics**
  - What do we need to do to ensure that we are successful?

- **Specific Action Items**
  - Actions, Customer, MyCo Resources, Due Date

#### Goals

How will we create value in this account?

- Describe the approach that we will take to grow our relationships within this account and create higher levels of value for our Customer.

#### Obstacles

What can prevent us from growing our Customer relationships?

- Describe any current or potential obstacles to our successfully achieving our goals as described above that the MyCo Account Team has identified.

#### Tactics

What do we need to do to ensure that we are successful?

<table>
<thead>
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<th>Specific Action Items to Drive Account Plan Execution</th>
<th>Customer Team Member That This Action Is Focused Upon</th>
<th>Additional MyCo Account Team Resources Required for Effective Execution</th>
<th>Due Date for Action Completion</th>
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*Note: The Strategic Account Manager Owns Primary Responsibility for the Accomplishment of All Specific Action Items*
Let’s review Section 7 (Account Action Plan) of the Strategic Account Plan. This component of the Plan is designed to be the catalyst for effective Supplier execution and Customer involvement.

1. For your selected account, please define one Goal.

2. For this Goal, describe the potential Obstacles that could prevent you from achieving it.

3. Now, go to the Tactics area of the Action Plan and list the Additional Resources required if you are going to reach your Goal and “make it happen.”
Involving Your Customer in the Account Planning Process

1. Define Customer and Supplier Team Participants
2. Discover Customer Internal Challenges & Business Objectives
3. Assist Customer in Developing Update Presentation
4. Explore Solutions and Target Areas of Potential Value Creation
5. Align Business Objectives/Supplier and Customer
6. Develop Customer-Specific Value Proposition(s)
7. Agree on Priorities and Mutual Action Plans Involving Both Parties
8. Revise Account Growth Strategy and Update Account Plan

Process inputs into the Meeting

Process outputs from the Meeting
Involving Your Customer in the Account Planning Process

When Should We Plan Collaboratively with Customers?

“Absolutely” a good idea, the foundation clearly exists for collaborative planning and your challenge at this point is how to stay at this level

“Usually” a good idea and you’re probably at least doing some informal planning now – trust and credibility is in place

“Sometimes” a good idea as there is acknowledged value, some trust and credibility established and some positive momentum in the account

“Probably not” a good idea as the risk outweighs the reward due to a lack of trust and credibility and a weak set of relationships
Effective Strategic Account Planning: Driving the Process?
Effective Strategic Account Planning: Who Drives the Process?

- Understand the Customer’s business and priorities
- Conduct internal account planning sessions with the Account Team
- Provide advice and problem solving to the Customer

- Ambassador, Strategist, Negotiator
- Provide coaching and leadership to the Account Team
- Engage the Customer in the planning process
- Leverage the value and expertise of their “Entire Company”

The Role of the SAM

- Coordinate resources to present “One Face to the Customer”
- Position and Sell “High and Wide” Throughout the Customer’s Organization
- Build long-term Customer relationships while meeting short-term revenue objectives
Creating a coaching environment in which the SAM and Manager will engage effectively and focus on sales priorities.

Moving the SAM from the vague to the specific by clarifying our position and validating our assumptions and conclusions.

Gaining concurrence on specific next steps, resulting in action plans and follow-up with the SAM to review and measure execution.

Evaluating the situation with the SAM by assessing ideas, priorities, options and resources and then connecting them into strategies.
Effective Strategic Account Planning: The Role of the Coach

Workshop Question?

Based on your personal experience, how can proactive coaching add value to the Strategic Account Management Process?

Engage and Focus
Clarify and Validate
Action and Follow-Up
Assess and Connect

Key #10
Comparing/Contrasting This Account Plan with Your Existing Plan

PMI Strategic Account Management Program
Strategic Account Plan

Customer Name:
Strategic Account Manager:
Account Team Members:
Sales Manager/Executive Sponsor:
Account Plan Revision Date:

My Company ‘MyCo’

Account Plan Contents

1. Account Information
   a. Customer Background
   b. Account Team
   c. Business Landscape
   d. Account Metrics

2. Summary of Opportunities

3. Account Relationship Assessment

4. Account Organization
   a. Account Structure
   b. Individual Relationships
   c. Team-to-Team Alignment

5. Account Value Scorecard

6. Account Growth Strategy

7. Account Action Plan
Summarizing the Keys to Effective Strategic Account Planning

1. Discover What the Customer Values Most and Validate  
   Sections 2, 5, 6
2. Define “What Is a Strategic Account?” and Assess Ongoing Fit  
   Sections 1, 3, 6
3. Establish Performance Metrics to Measure and Track SAM Execution  
   Sections 1, 7
4. Integrate and Balance the Account and Opportunity Planning Processes  
   Sections 2, 6
5. Assess and Strengthen the Account’s Most Strategic Relationships  
   Sections 3, 4
6. Align the Supplier’s Objectives with the Objectives of the Customer  
   Sections 4, 6
7. Position and Differentiate Supplier’s Unique Value with the Customer  
   Sections 5, 6
8. Develop and Implement a Proactive Strategy to Grow the Account  
   Sections 2, 6, 7
9. Engage the Customer in the Account Planning Process  
   Sections 3, 6
10. Provide Coaching and Sponsorship to Account Teams as Needed  
    All Sections!
Summarizing the Keys to Effective Strategic Account Planning

**Process**

- **Customer Defined Value**
- **Plan**
- **Management Process**
- **Review**
- **Execute**
- **Adapt**

**Value**

**Relationships**

**Roles**

**Approach**

- **Teamwork & Communication**
- **Supplier Solutions, Resources & Expertise**
- **Account Team Knowledge & Skills**
- **Internal Planning with Account Teams**
- **External Planning with Customers**

**Plan**

- **PMI SAM Program**
- **Strategic Account Plan**
- **My Company**
- **MyCo**

**Developing Customer-Specific Value Propositions**

1. Customer’s Industry Drivers
2. Customer’s Business Objectives
3. Customer’s Operational Issues
4. MyCo’s Solutions
5. MyCo’s Advantages
6. MyCo’s References
7. MyCo’s Unique Value

- **What are the market factors that are impacting the Customer’s business?**
- **What is the Customer doing to address these Industry Drivers?**
- **What could prevent the Customer from meeting their Business Objectives?**
- **How will MyCo work together with the Customer to resolve their Operational Issues?**
- **How is MyCo different from our competition in solving these Operational Issues?**
- **Which other Customers has MyCo helped solve similar Operational Issues?**
- **How does MyCo’s Solution address the Customer’s needs and deliver unique value?**

**Assessing and Strengthening Your Strategic Account Relationships**

- **Planning Partner Status**
- **Vendor Status**
- **Preferred Supplier Status**
- **Customer Considers Us Strategic To Their Business**
- **Customer Wants to Do Business With Us**
- **Customer Needs to Do Business With Us**
- **Customer Does Business With Us**
- **Trusted Advisor Status**

**The Role of the SAM: A Profile for ‘Next Level’ Success**

- **Knowledge**
  - Supplier’s Company
  - Supplier’s Solutions
  - Supplier’s Business Processes
  - Supplier’s Industry
  - Supplier’s Partners
  - Supplier’s Competition
  - Supplier’s Unique Value
  - Customer’s Business
  - Customer’s Industry
  - Customer’s Customers
  - Customer’s Competitors
  - Customer’s Account History
  - Customer’s Culture

- **Skills and Abilities**
  - Business Problem Solving
  - Communication & Presentation
  - Executive Selling
  - Leadership & Coaching
  - Negotiation: Internal & External
  - Argument: Internal & External
  - Planning
  - Action Oriented

- **Attributes**
  - Trust
  - Credibility
  - Relationship Oriented
  - Integrity
  - Business Judgment
  - Business Acumen
  - Team Oriented
  - Goal Oriented
  - Results Oriented
  - Visionary
  - Competitive
Benchmarking Your Strategic Account Management Process

- Account Plan Updates Reflect Evolving Customer Needs
- Supplier Objectives Aligned/Realigned with Customer Objectives
- Balance Between Short and Long-Term Objectives and Priorities
- Supplier Becoming More Strategic to Customer

- Regularly Scheduled Team Meetings and Account Reviews
- Ongoing Assessment of Customer Relationships and Value Creation
- Performance Assessed with Defined Metrics and Measures
- Opportunity Reviews Conducted for Key Sales Opportunities

- Account Planning with Effective Growth Strategies
- Collaborative Planning with Customer Involvement
- Opportunity Planning with Winning Sales Strategies
- Team-to-Team Alignment and Authentic Customer Relationships

- Effective Teamwork and Deployment of Account Team Resources
- Proven SAM and Sales Best Practices
- Consultative Skills Focused on Customer Value Creation
- High and Wide Networks of Customer Sponsors and Supporters
### Assessing Your SAM Effectiveness

Please conduct your SAM Effectiveness Assessment by ranking each of the 16 items below on a scale of 1-5: 5 = very effective and 1= ineffective

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Workshop Wrap-Up

Thanks for Your Participation in
The Keys to Effective Strategic Account Planning