

Major Account Planning



CONTINUITY & RESILIENCE

Go deeper and wider to protect and grow strategic accounts.

Major Account Planning (MAP) is a facilitated planning program for sellers/account managers/account teams who are charged with maximizing sales results and customer satisfaction in strategic accounts.

Major Account Planning enables account managers to develop an effective plan for generating high-value sales and raising the level of relationship in major accounts, thus improving margins while simultaneously defending the account from competitive encroachment.

It is based on a repeatable process for planning effective activities and efficient application of resources for improved sales and relationship-building within an account and includes supporting analysis and planning tools.

THE MAJOR ACCOUNT PLANNING PROCESS





PROGRAM OBJECTIVES

At the end of this workshop, participants will be able to:

- Plan for maximizing value in an account
- Identify tactics for (further) penetrating an account
- Identify opportunities for new business with an account
- Create a plan to achieve revenue and relationship objectives
- Navigate the decision-making politics within an account
- Develop higher levels of relationship with account stakeholders

INTENDED AUDIENCES

Major Account Planning is designed for any sellers/account managers/account teams who manage business with major or strategic accounts, using either assigned personnel, virtual support resources, partners, or any combination of those.

MULTIPLE DELIVERY MODALITY OPTIONS

MAP can be learned through live instructor-led training (ILT) workshops, via virtual instructor-led training (vILT) sessions, or online through on-demand eLearning and video-based content. However, because MAP is a comprehensive account planning methodology, we find that a blended learning approach that incorporates a mix of delivery modalities produces the best results.

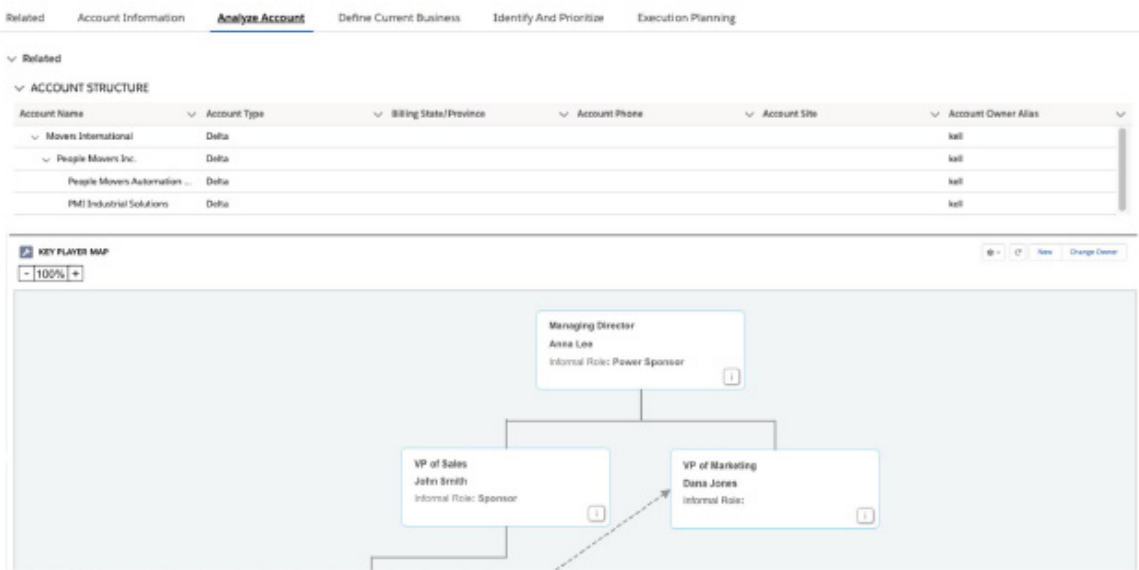
For ILT and vILT delivery, each Richardson Sales Performance instructor has been certified to rigorous standards, and they each bring at least 15 years of sales and management experience to ensure their credibility and enhance facilitated discussions. Alternatively, Richardson Sales Performance can certify client instructors for in-house delivery and coaching, at the client's option.

INSTRUCTIONAL MATERIALS

The workshop is designed with adult learning principles in mind. The program's instructional materials facilitate participant understanding by using a mix of media to transmit and reinforce key learning points. SPI provides full-color training content in electronic workbooks, for use on participants' mobile devices or computers, as well as color reference charts, animated presentations, and video content, where appropriate.

USEFUL SALES TOOLS AND JOB AIDS

As participants complete the pre-workshop exercises and the in-workshop planning exercises, they capture the results in the Major Account Planning for Sales application. This application is a Salesforce native, collaborative application designed to support all phases of the account planning process. Users will work within their Salesforce under the Major Account Planning tab. After the workshop, account managers continue to use this Account Planning application for effective execution of their account plan and for developing future iterations of account plans and video content, where appropriate.



Account Planning tools include:

- Account Information – records essential information about the account’s vision, the seller’s strategy for the account, key historic events and milestones, industry trends and account team
- Key Player Analysis – captures the formal and informal structures within an account, the key people in the account, and their roles
- Business Initiatives – defines business drivers within the account
- Current Opportunities and Recurring Revenues – captures and calculates the value of current business within an account
- White Space Analysis – identifies and quantifies potential opportunities for creating new value within an account
- Execution Plan – records the seller’s strategic objectives for the account, the actions and resources required to achieve the objectives.

STRATEGIC VALUE

Major Account Planning provides account managers with a repeatable and practical methodology for winning more business in strategic accounts and elevating the level of relationship within those accounts. The outcomes of this methodology are higher levels of sales revenue, a greater share of spend within the account, and more efficient use of resources, thereby, lowering cost of sales and improving margins on business in that account.



RICHARDSON SALES PERFORMANCE

Growth, simplified



CONTINUITY & RESILIENCE

Richardson Sales Performance is the global leader in sales training and performance improvement. The improved sales training company drives accelerated growth by simplifying and solving the sales-growth equation. From ensuring your sales managers are executing the right activities to equipping your sales team to drive a buyer-aligned sales process with exceptional skills and strategies, we will guide your sales organization through a digitally-enabled performance journey that excites, engages and reveals results. Get to know us and experience what is possible – managers who know exactly how to drive growth from their teams, customers who see the difference in how your sales team shows up and a clear path to outperformance.

