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AO
Account Optimizer

Strategic Account Planning

Account Optimizer (AO) is a native Salesforce® app designed to simplify the maintenance and growth of even the most complex accounts via a proven account management methodology.

Manage, retain and grow strategic accounts through cross-selling and upselling.

- Increase market share through a strategic map that identifies cross-sell opportunities.
- Develop an executable account plan with an easy to collaborate and review process.
- Improve teamwork through collaboration and coordination of team activities.
- Reduce interdepartmental barriers to improve communication.
- Increase user adoption of Salesforce®.

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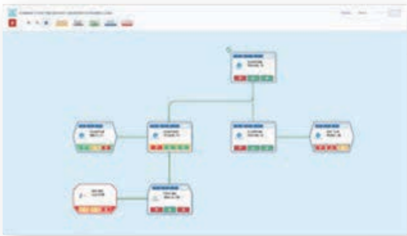
This is a strategic account management methodology designed to improve the following core competencies:

- The ability to understand and navigate the core elements of a large, complex strategic account.
- The ability to understand the player and political dynamics impacting decision making in a complex account.
- The ability to understand the core business insight needed to create demand in complex account.
- The ability to understand and develop a strategic plan to effectively manage, retain and grow a strategic account.
- The ability to build, collaborate and improve a strategic account plan to maximize retention and growth of an account.

Company Structure



Develop a strategic map of all the revenue and cost units including divisions, subsidiaries with a visuals of the influence, preference, access and relationship.

Visual assistance on developing a strategy and plan on how we can leverage strengths and minimize weaknesses to increase penetration and market share.

Business Insights

Create demand for cross-selling specific products and services by uncovering clients, unresolved goals, objectives, obstacles, issues and challenges.

Identify potential initiatives that creates opportunities for our products and services.

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Power Chart

Identify all the players in the account who are involved in any decision-making process including customer contacts, external influencers, partners, competitors and your company's team.

Graphically categorize the players to Power, Influence, Access and Decision Role.

Opportunity Map

List of all opportunities within the account by stage.

Manage a rollup of all open opportunities for all revenue and cost units, divisions and subsidiaries.

SWOT Analysis

Prioritize and customize Strengths, Weaknesses, Opportunities and Threats, having it readily available for updating as the account matures.

Mutually Agreed Plan

Document clients criteria verses your developed plan to see where the alignment and/or gaps are.

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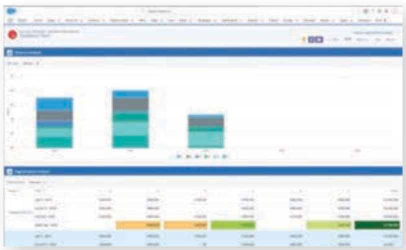
White Space Segmentation



Identify all the key business units, support units and divisions past and current revenue with future potential by product group/family.

Develop a strategic map of all the active and potential cross-selling opportunities that exist in the account over the next 3-18 months and a plan to pursue them.

Relationship Vitals

Monitor trends in the relationship over time based on your criteria and listed in numerical value.

Competitive Landscape Tool

Comparative chart of your knowledge about the competitive landscape in your sales cycle. Based on score, rank yourself verses key buying criterial verses your competition.

Corporate Persona

Describe the customer's persona in a fully customizable module with up to 8 sections. For example: goals, strategy, desires, challenges and financial.

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Ideas

Capture ideas in a planning session or a meeting for full organization.

Document and categorize ideas into opportunities and/or action items based on your company values.

Activity Management

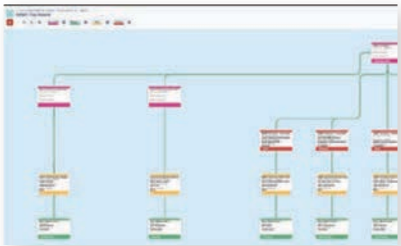
Manage and roll-up of all open activities for all related accounts, sub-accounts and opportunities part of the account hierarchy.

Journey Map

Map the customers buying journey with your selling process.

Recognizing their journey to understand and build stronger customer relationships.

Solution Map



Map an Account Hierarchy and review the Account/Opp Plan in a single interface

Identify your deals, capture what Business Drivers influence the process and create Ideas to potentially convert to?

Additional feature includes export functionality:

- **Export** each of the modules into PowerPoint slides, with the ability to include/exclude client's logo.
- **Document and collaborate** the progress of your account plan by storing the file or sharing through any file upload channel.