

Strategic Account Planning



Abstract

Strategic Account Planning for AppExchange is an application that helps sales managers and executives collaborate, plan, and manage goals and strategies for penetrating strategic accounts.

Description

Strategic Account Planning is used by both sales managers and executives for creating and managing account plans and the associated strategies and execution tactics for these plans. Typically, the planning process is performed 1-2 times per year and is used only for strategic accounts where a company makes the decision to proactively target this account.

The Strategic Account Planning application contains two primary modules: Account Plans and Strategies. Account Plans are tied to specific accounts and contain the overall goals for the account such as the revenue targets, account goals, strengths, and challenges. For each plan is a set of strategies that define how the account owner will meet the revenue targets by selling specific products to specific divisions, departments, or people in the account. Successful progress of a strategy typically results in the creation of an opportunity.

Highlights

Name	Description	Type
Account Plan	Overall goals, objectives, and challenges for penetrating an account.	■ □
Account Strategy	Specific set of strategies tied to each account that the sales manager needs to execute. Each strategy lists specific revenue goals and products to be sold to a particular division or department. Tasks and milestones are also attached to each strategy.	■ □

■ = Custom Object, □ = Custom Tab, ● = Custom Link, ◆ = Custom S-Control
≡ = Plug-In, ✕ = Composite Component

Features & Benefits

- Integrated Account Planning - Increase revenue and penetration of strategic accounts
- Multiple Strategy for each Account - Implement best practices and effective planning process
- Plan Activity Management - Collaborate sales team activities and goals

Key Reports & Dashboards

Name	Description
Account Plan % Growth	Estimates for account planning growth year over year.
Strategy Amounts by Date and Status	Show account strategy pipeline by date and status
Account Plan completion Status	Show the completion status and history by account.
Largest Plan Goal by FY	Show the largest account plans year over year.
Strategy Amounts by Completion Date	Show projected estimated strategy amounts by date.

Requirements

External Service	None
Salesforce.com Edition	Professional Enterprise

Specifications

Publisher	salesforce.com
Type	Native
Salesforce.com Certification	None
Pricing	Free

Strategic Account Planning



Screenshot

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Strategic Account Planning

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Create
New...

Messages and Alerts

Welcome to Strategic Account Planning.

It is a collaborative account planning application for sales managers and executives to plan goals and strategies for penetrating strategic accounts. It can assist your sales organization to:

- Guide the process of planning and account penetration

Eval User at salesforce.com
Tuesday January 24, 2006

Winter '06 New Features

Dashboard
Refresh
Customize Page

As of 1/24/2006 7:46 AM

FY06 Account Plan Completion Status

Plan Status	Record Count
Draft	3
Review	4
Approved	6

Results of FY05 Account Strategies

Strategy Status	Sum of Estimated Total Revenue (Millions)
Not Started	~0.4
Opportun...	~1.8
Won - Ac...	~2.8
Won - Par...	~0.8
Lost - No...	~1.4

Top 5 FY06 Account Sales Goals

Account Name	Sum of Plan FY Account Sales Goal
Grand Hotels & Resorts Ltd	\$3.6M
Express Logistics and Transport	\$1.9M
Pyramid Construction Inc.	\$1.6M
United Oil & Gas, UK	\$1.6M
United Oil & Gas Corp.	\$1.6M

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