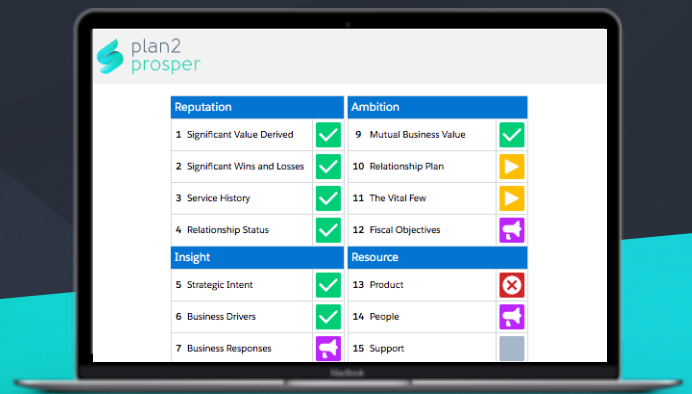




Enrich account planning

Win, keep & grow customer accounts.
Build deeper, stronger and longer lasting relationships with true account insight and dynamic development plans to reflect your business.

Elevate the impact of your relationship development

Align

Tailor your Salesforce process easily and effectively to reflect your own account planning process.

Adapt to meet your business requirements, using your language and nuances, alongside best practice methods.

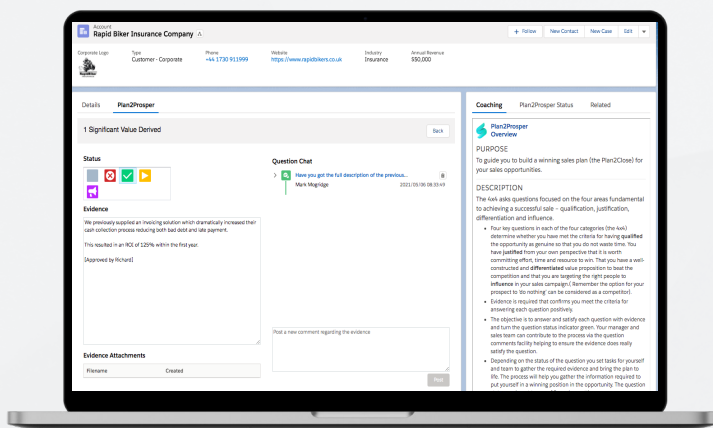
Unify all levels within your organisation to understand required and best actions in your account development activities.

Understand

Gain deeper understanding of your customers strategic initiatives, uncovering your true value drivers beyond price or product.

Develop foresight of new opportunities to increase your win rates and competitive advantage.

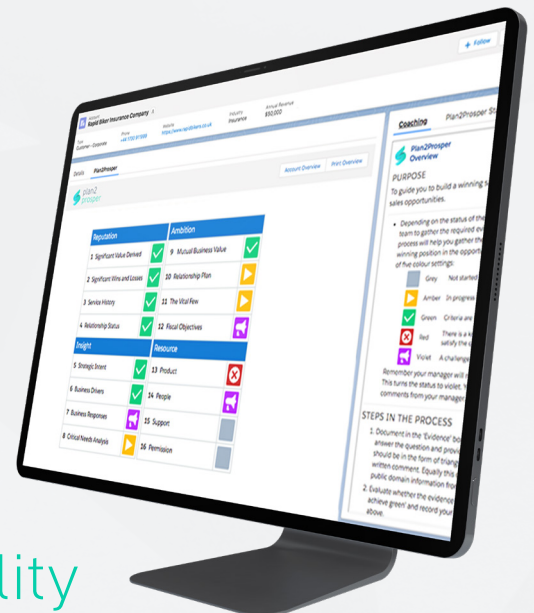
Build, broaden and demonstrate trust with your account relationships as a trusted, proactive partner.



Consistency

Embed one consistent account plan into your Salesforce process to ensure buy-in and adoption by the entire virtual team.

Enable true collaboration and encourage team participation and selling, leveraging your full team resource to win across all disciplines.



Visibility

Optimise management understanding of their teams, key accounts and account penetration.

Drive and motivate behaviours and activity with reporting and analytical transparency.

Explore key features



Build & Develop

Build incisive account plans to maximise penetration.

Collaborate effectively across your entire virtual team and customer contacts.

Marry your Salesforce process with your sales methodology by integrating the 'what to do' with the 'how to do it'.

Equip your account managers to become true orchestrators of account development activity.



Grow

Uncover incremental business opportunities.

Encourage sales to think outside the box to understand full account potential.

Progress account activity through agreed targeted tasks.

Plot your route to achieving trusted advisor status with your customer key accounts.



Collaborate

Manager review dialogue and team commentary for actionable feedback and collaboration..

Dynamic in-line coaching to guide users through using your sales methodology.

Designed to fully support team collaboration in remote and hybrid working environments.



Analyse

Out-of-the-box reports & dashboards to monitor account activity and status.

Determine what you do and do not know about your key accounts.

Manage and prioritise activity across accounts highlighting interdependencies.

Trusted by global brands and used daily by thousands of salespeople



VERINT

Canon



Why Choose Plan2Prosper?



Native to Salesforce

A seamlessly integrated, intuitive Lightning experience, secure and stable, with real-time customer insight. 5* rated on the Salesforce AppExchange.



Flexible & dynamic

Designed to fit your world; effortless customization to fit your sales organisation, support remote working and evolve with you.



Simple & intuitive

A clean, modern interface to streamline complex practices, designed for efficiency and ease-of-use.

Discover our sales performance apps on the Salesforce AppExchange

