GSP Key Account Planning

App Setup Guide

THE GARY SMITH PARTNERSHIP
www.garysmithpartnership.com

GSP Account Planning

APP SETUP GUIDE

Version: 2.0

GSP.
GARY SMITH PARTNERSHIP

Contents

1 Introduction

Welcome to the GSP Account Planning app!

The app makes it quick and straightforward for people to create powerful account plans in Salesforce.

The Account Planning app is ready to use out-of-the-box. However, you can also adjust several optional items to tailor the app to your specific needs.

The purpose of this guide is to:

- Get you going straightaway with the Quick Start section.
- Describe the out-of-the-box features that are ready to use right now, and
- Explain with fully illustrated steps how you can customize the app to your specific needs.

Any questions? Don't hesitate to get in touch using our Contact Us page.

With that, let's get started.

2 Account Planning Quick Start Guide

Here are the simple steps to start using the Account Planning app straightaway. There are additional ways you can fine-tune the app, but the essential steps are these:

1. **Install the app**. *Click for detailed steps*.

   You do this by clicking **Get It Now** (no payment details required) from this AppExchange Listing. Choose whether to install the app in your production environment or a sandbox. Either way, we recommend you select the option, **Install For All Users**.

   Remember, you get a free 14-day trial of the app.

2. Add the **Key Account Planning** related list to the Account Page Layout(s). *Click for detailed steps*.

   You take this simple action by clicking:
   - Setup, Object Manager, Account.
   - Page Layouts, then your Account Layout.
   - Select Related Lists.
   - Drag **Key Account Plans** onto your page.
   - Click Save.

   Remember, add the Key Account Plan related list to each Account Page layout if you have more than one.

   You are now ready to create an Account Plan. Click **New** from the Key Account Plan related list on an Account. There's a full description of all the fields *here*.

3. **Add a custom field** to the Account Plan. *Click for detailed steps*.

   You can add fields to the Account Plan Layout by following these steps:
   - Click Setup, Object Manager, **Key Account Plan**.
   - Click Fields & Relationships.
   - Create your new field.
   - Modify the page layout and position your new field appropriately.

4. **Modify picklists on the Account Plan related records.**

   You can change the picklists on any of the related records including *Objectives*, *Account Plan Contact Roles*, *Account Plan Partner Roles*, and *Account Plan Colleague Roles*.

   To do this:
   - Go to Setup, Object Manager.
   - Navigate to the relevant object.
   - Click Fields & Relationships.
   - Modify the picklist values.

5. Initiate the **Account Hierarchy** page. *Click for detailed steps*.

   The Account Hierarchy button on the Account Plan gives you a powerful overview of a group of companies linked through the standard parent-child relationship.

   When you install the app you need to take a one-time step of initiating the relationships within the page:
   - Click the Account Plan Setup tab within the app.
   - Click the button, Link Historical Accounts.

   Pro Tip: If you have lots of validation rules on the Account you might want to temporarily switch these off whilst initiating the page.

6. **Roll-up custom fields** from the Opportunity to the Account Plan. *Click for detailed steps*.

   By default, the app rolls up values from the standard Amount field on the opportunity to the Account Plan. However, you can also roll up custom currency and number fields, and track performance versus target.

   There are some straightforward steps to do this, click the Detailed Steps link for full instructions.

7. Modify the **Account fields**. *Click for detailed steps*.

   The app gives you two optional fields on the Account for segmenting customers and prospects. You can modify these fields by clicking:
   - Setup, Object Manager, Account.
   - Fields & Relationships.
   - Click on the Current Segment and Target Segment fields.
   - Modify the picklist values then add the fields to your Account page layout(s).

8. Modify the **reports and dashboards**. *Click for detailed steps*.

   The app includes separate Lightning and Classic dashboards with underlying reports. To view the Lightning version of the dashboard, click:
   - the Dashboards tab.
   - All Folders.
   - Account Planning.
   - Account Planning (Lightning) dashboard.

   You can edit the dashboard and reports using the standard Edit capabilities (we recommend you Save As each report before making a change).

9. Leave an **AppExchange Review**. *Click to go to the AppExchange Listing*.

   If you love our app, we'll be thrilled if you can leave a review on the AppExchange. Please help us share the love 😊.

10. Get more **help and best practices**.

    We'll help you setup the GSP Account Planning app in your Salesforce environment or discuss how it can be further customized to meet your needs.

    Don't hesitate to get in touch *via our website*.

3 GSP Account Planning App Setup Guide

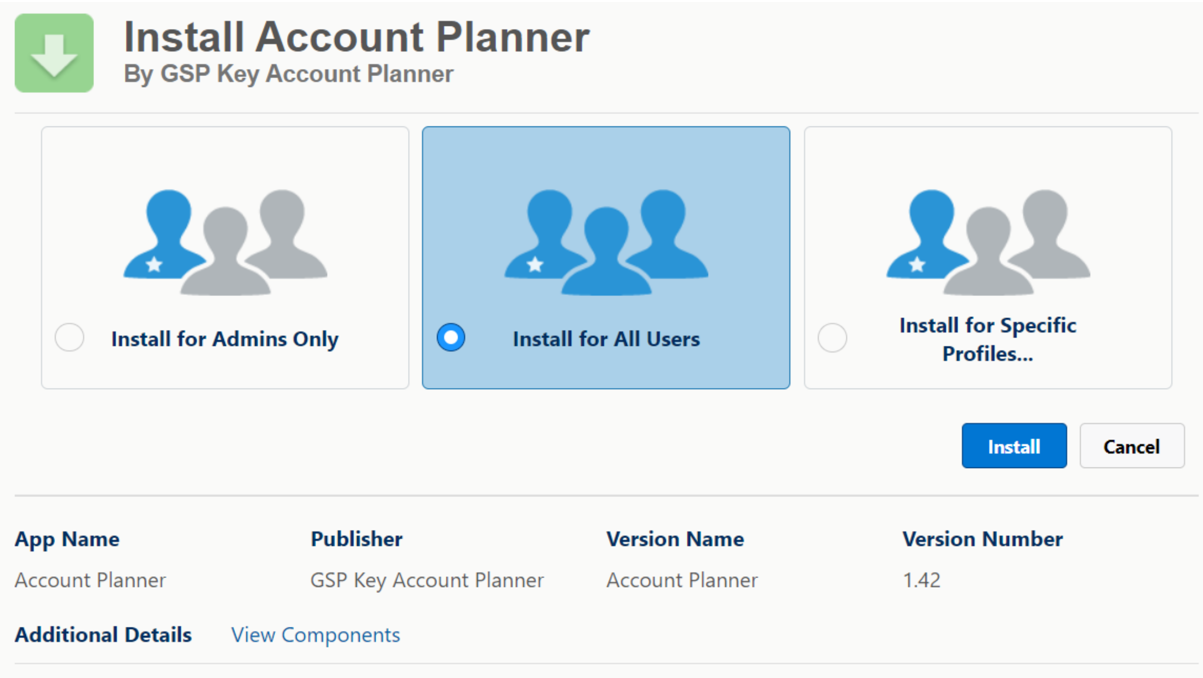
This section walks you through the full setup and customization options of the GSP Account Planning app.

3.1 Install the Account Planning App

You install the app directly from the AppExchange. Here's the link to the *GSP Account Planning AppExchange Listing*.

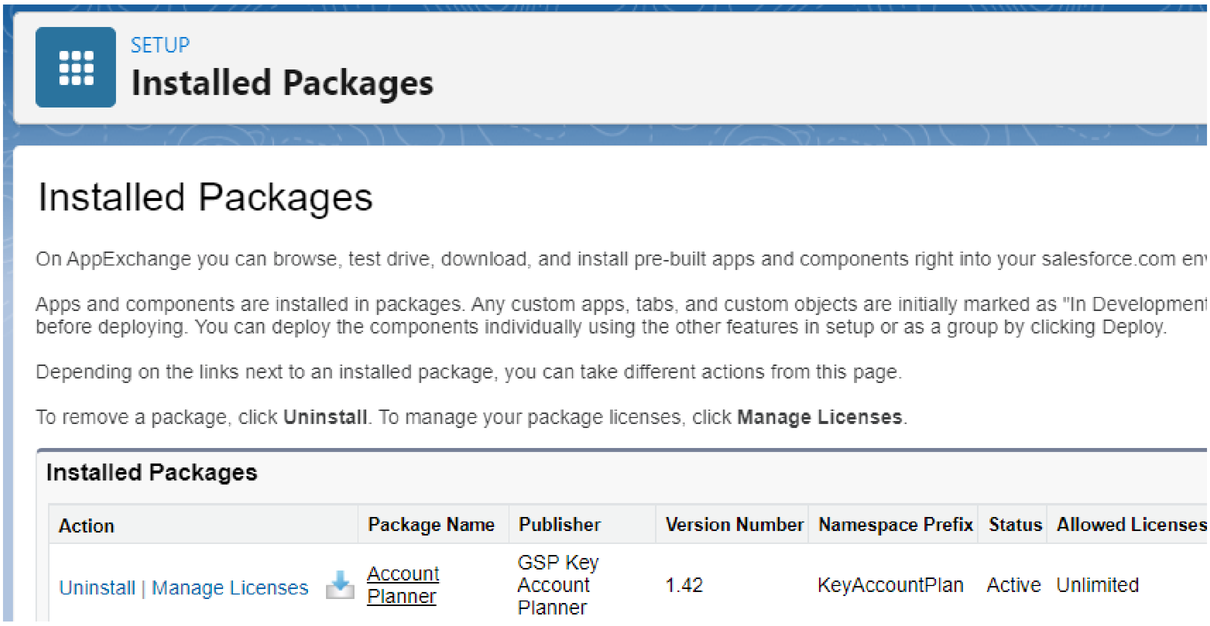
To begin, click the **Get It Now Button**. If you are trialing the app, there's no need to enter your card or other payment details.

Follow the instructions to install the app. We recommend you assign the app to **All Users**.



You might get a message saying the app is taking time to install. That's often the case with AppExchange applications, and it's quite normal.

To check the app is installed, click Setup, then search for Installed Packages.



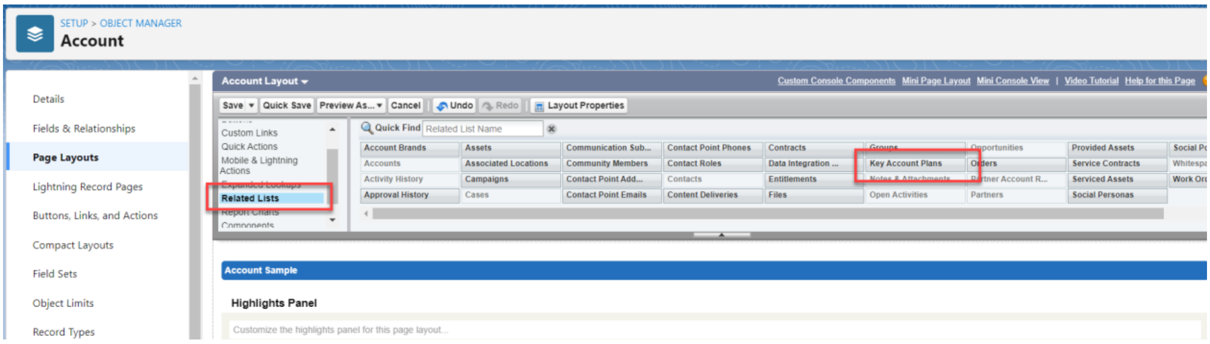
You should see the Account Planner included in the list. If it's not there, wait a couple of minutes and check again.

3.2 Add the Key Account Plans Related List

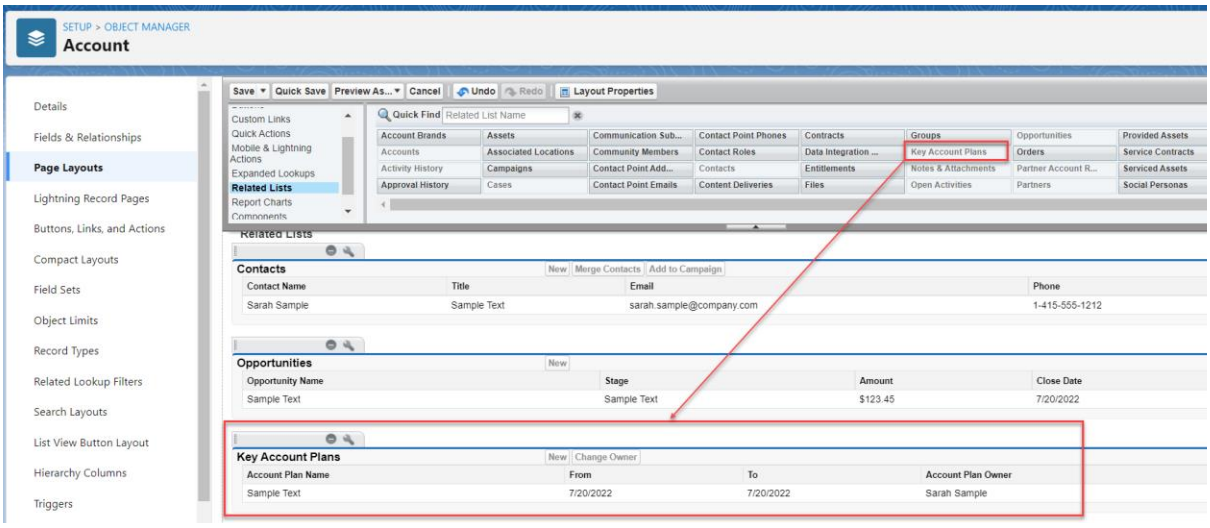
The next step is to add the Key Account Plan related list to your Account page layout.

To do this:

a) Go to Setup, Object Manager.
b) Click on Account.
c) Select Page Layouts, then click on the name of the first page layout.
d) Click on Related Lists.



e) Drag the Key Account Plans Related List onto your Account Page Layout

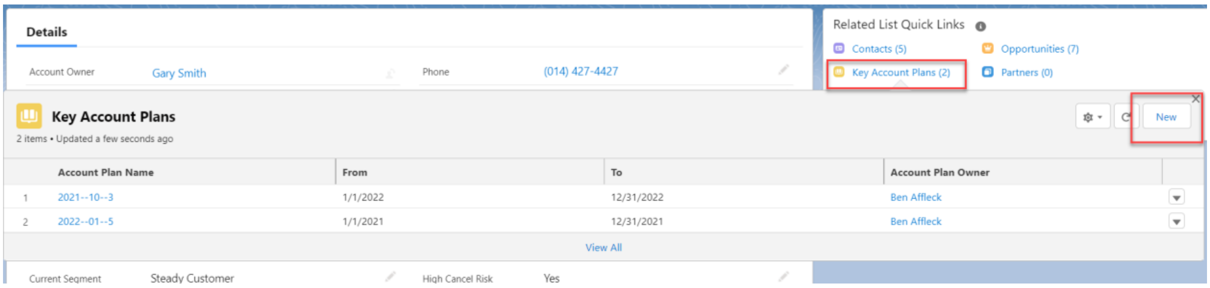


f) Don't forget to click Save.

Remember, you'll need to do this for each Account Page Layout if you have more than one.

3.3 Try Creating an Account Plan

To check everything is working, go to an Account, then click on New on the Key Account Plan Related List.



We're using the Related List Quick Links in this image; you may have your related items displayed differently but the principle is the same: click **New** on the Key Account Plan list.

You're ready to create your first Account Plan.

3.4 Account Plan Fields Explained

The Account Plan Page Layout has the fields in the table below.

Remember, you can add custom fields that are important to your business to the Key Account Plan object (and remove any standard fields you don't need).

Key Account Plan field	Description
SECTION: KEY ACCOUNT PLAN DETAIL	
Account Plan Name	Auto number that increments for each new Account Plan. Optionally, you can create an additional custom text or formula field for Account Plan Name. We explain how to do this in the next section.
Account Plan Owner	By default, this is the person creating the Account Plan. You can change this to another Salesforce user.
Active	This checkbox is True if today's date falls between the From and To dates (inclusive). It's a useful field for identify all current Account Plans in reports.
From	The start date of your Account Plan. Often, you'll want to use the first day of your financial or calendar year.
Period	This picklist defines the duration of your Account Plan (for example, twelve months).

To	This date field populates automatically based on the From and Period dates. The field is not visible by default on the Key Account Plan page layout.
Number of Account Plan Roles	Automatically sums the number of Account Plan Contact Roles (see next section for detailed explanation of this object).
Approval Status	This field can be manually updated by users, or automatically updated using an Approval Process. Configure a Salesforce approval process if you want managers to approve Account Plans. The picklist values in the field can be changed to reflect the approval process you create.
SECTION: ACCOUNT PLAN STRATEGY	
Customer Goals	Use this field to record you understanding of the customer's critical objectives during the lifetime of the Account Plan.
Our Goals	These are your goals – the high-level things you want to achieve with this customer during the lifetime of the Account Plan (we'll come to Objectives in the next section).
SWOT Analysis	Your Strengths, Weaknesses, Opportunities and Threats, in the context of your relationship with this customer or prospect.
Stakeholder Management Plan	Describes your strategy for building and developing relationships with the essential people at your customer (see also Account Plan Contact Roles and Account Plan Partner Roles in the next section).
Internal Support Required	The actions and support you'll need from within your business to execute your Account Plan successfully.
Quick Wins	The short-term action plans and successes you can achieve with your customer.
Competitors	The critical competitors you'll need to track.
SECTION: KPI's	
Sales Target*	The value of won opportunities you are aiming to close during the lifetime of the Account Plan.
Won Revenue*	The value of Closed Won opportunities linked to the Account Plan.
Pipeline*	The value of all open opportunities linked to the Account Plan.
Weighted Pipeline*	The weighted value (based on the probability) of all open opportunities linked to the Account Plan.
Total Expected Revenue*	The sum of Won Revenue plus the Weighted Pipeline.
Forecast Target Variance*	The difference between the Sales Target and the Total Expected Revenue.

*Covered in more detail in the section on linking opportunities to Account Plans.

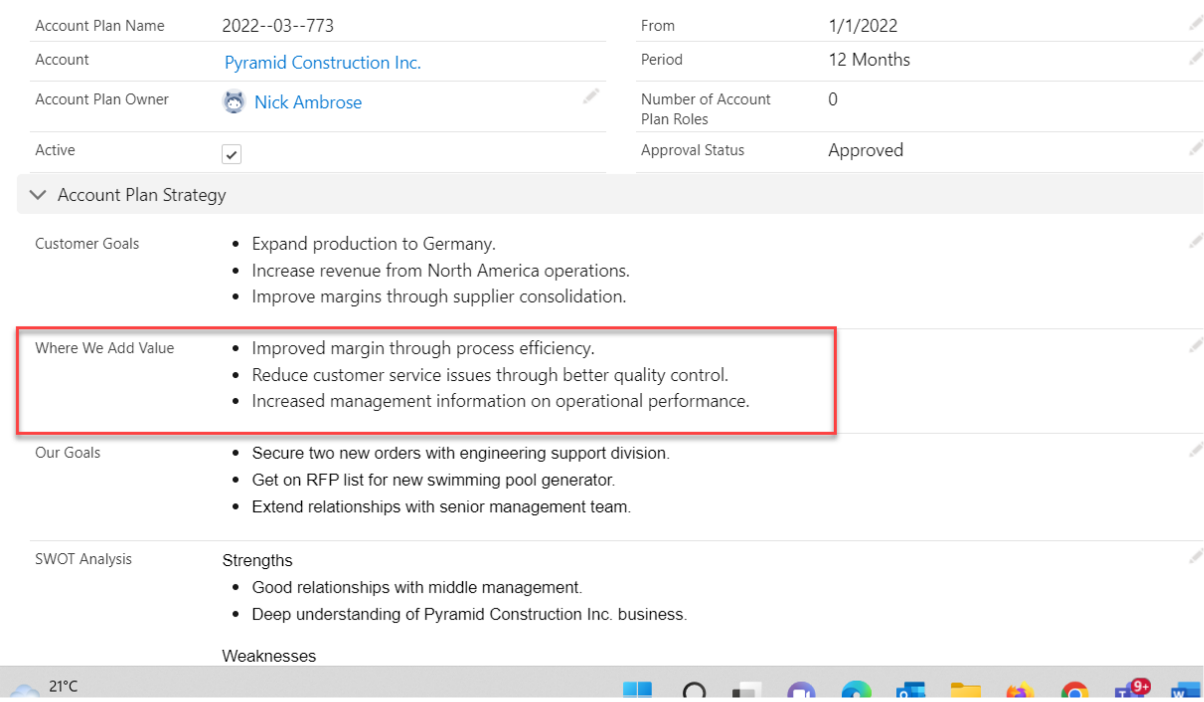
3.5 Add Custom Fields to the Account Plan

You can easily add custom fields to the Account Plan. For example, let's say you want to add a field called Where We Add Value.

Here are the steps:

a) Click Setup.
b) Object Manager.
c) Navigate to the Key Account Plan (the object is called **Key Account Plan** not Account Plan).
d) Fields & Relationships.
e) Create your new field.
f) Modify the page layout and position your new field appropriately.

Here's what that will look like to the user:



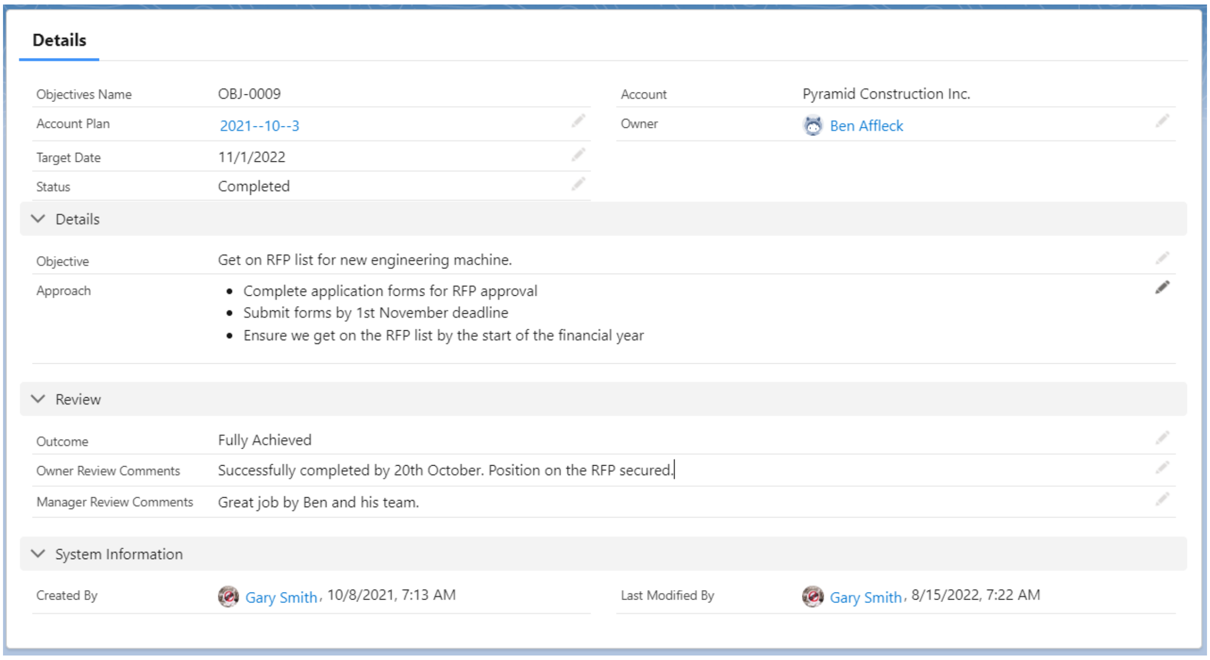
In this case, we used a Text Area (Rich) field so users can enter bullet points and other punctuation.

3.6 Account Plan Related Sections Explained

There are the following Related Lists below the main body of the Account Plan layout.

3.6.1 Objectives

Objectives are the specific things you need to achieve to execute your Account Plan successfully. Remember, the Objective owner can be different to the Key Account Plan Owner.



You can use the Outcome, Owner Review Comments, and Manager Review Comments to record post completion notes and lessons learned.

You may also want to record Activities on the Objectives page layout to schedule and track actions needed to complete the Objective successfully.

Use the reports and dashboard that comes with the app to track overall progress on Objectives.

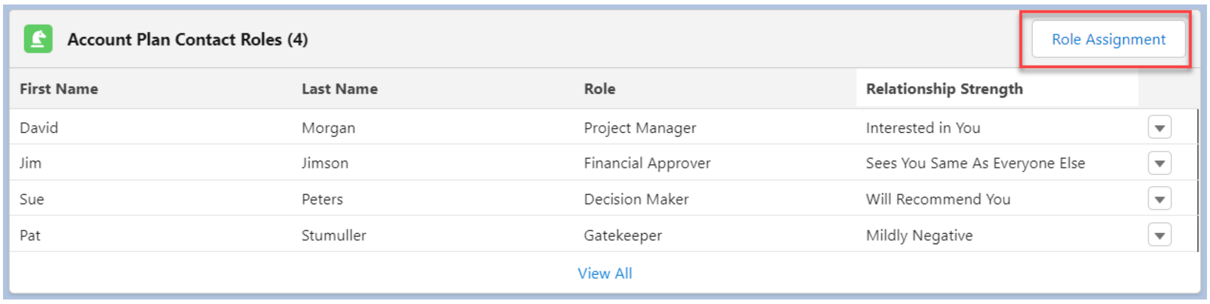
3.6.2 Account Plan Contact Roles

You can track the role played by Contacts at your customer in the context of the Account Plan using the Account Plan Contact Roles.

This feature also allows you to define the extent to which each Contact is a positive or negative influence on your Account Plan.

You can, of course, customize the picklist values for the Role and Relationship Strength. See the end of this section for instructions on how to do this.

To get started, click the **Role Assignment** button on the Account Plan Contact Roles related list.

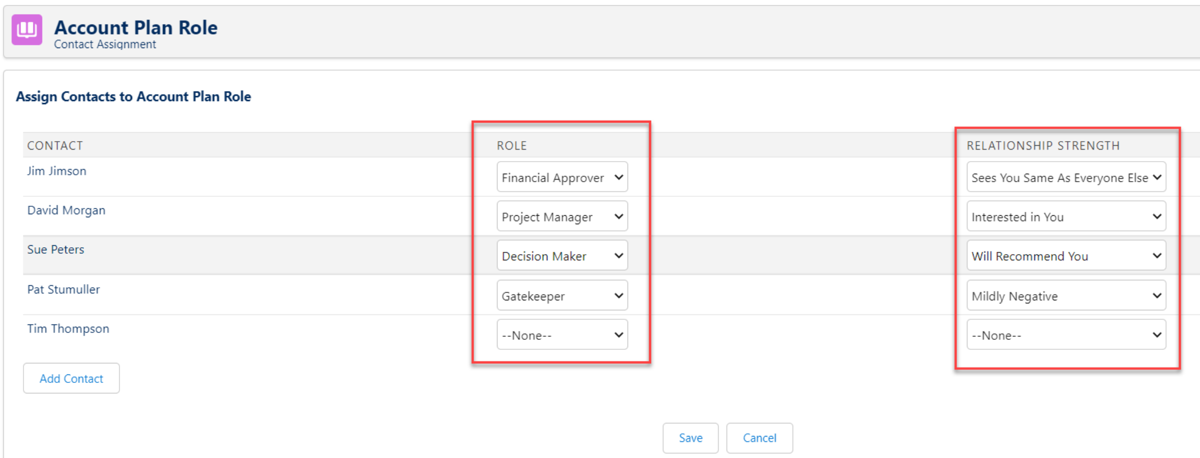


Account Plan Contact Roles (4) — Role Assignment

First Name	Last Name	Role	Relationship Strength
David	Morgan	Project Manager	Interested in You
Jim	Jimson	Financial Approver	Sees You Same As Everyone Else
Sue	Peters	Decision Maker	Will Recommend You
Pat	Stumuller	Gatekeeper	Mildly Negative

View All

The next page lists all the Contacts on the Account. You can define the Role and Relationship Strength for the Contacts. (You don't have to do this for every Contact, only those you believe are playing an important role in the context of your Account Plan).



You can also use the Add Contact button in the lower left corner of the page to add Contacts from other Accounts.

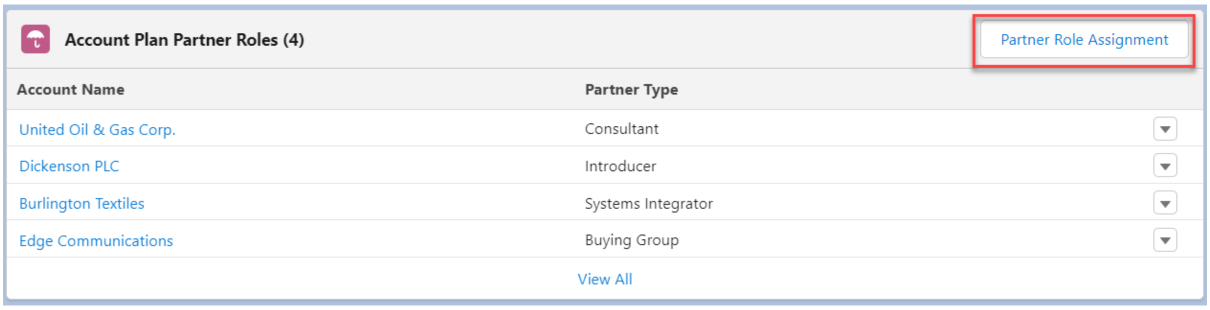
Finally, here's how to modify the Role and Relationship Strength picklist values:

a) Go to Setup, Object Manager.
b) Scroll down to the Account Plan Contact Role object.
c) Click Fields and Relationships.
d) Click the Role or Relationship Strength field.
e) Modify the picklist in the Values section.

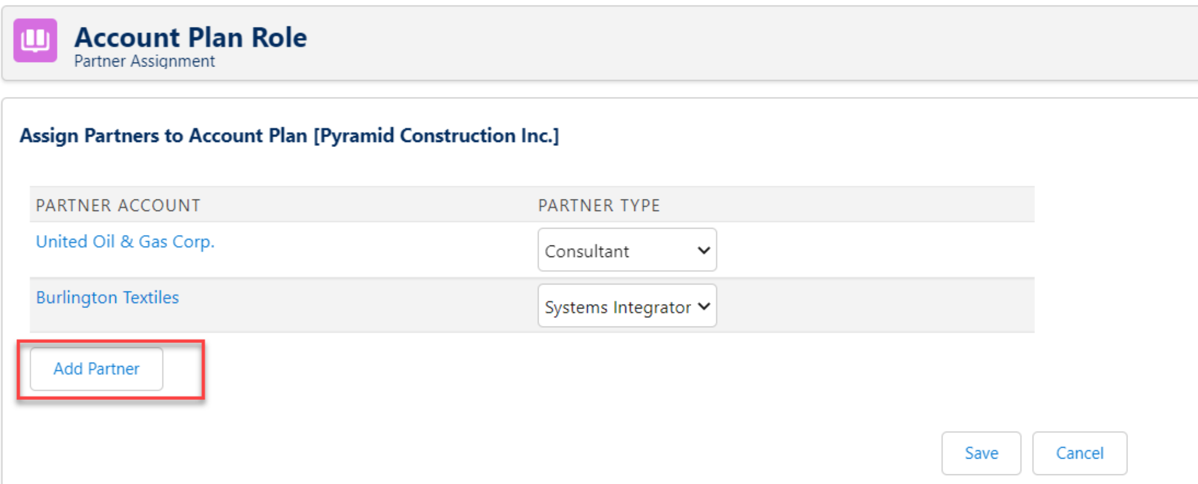
3.6.3 Account Plan Partner Roles

In the previous section, we defined the people playing a role on your Account Plan. The Account Plan Partner Roles let's you define the other companies that will influence the success of your plan.

To get started, click the Partner Role Assignment button on the related list.



On the next page, use the Add Partner button to search for and add other Accounts.



Finally, define the role of each company using the Partner Type field.

Here’s how to modify the Partner Type picklist values:

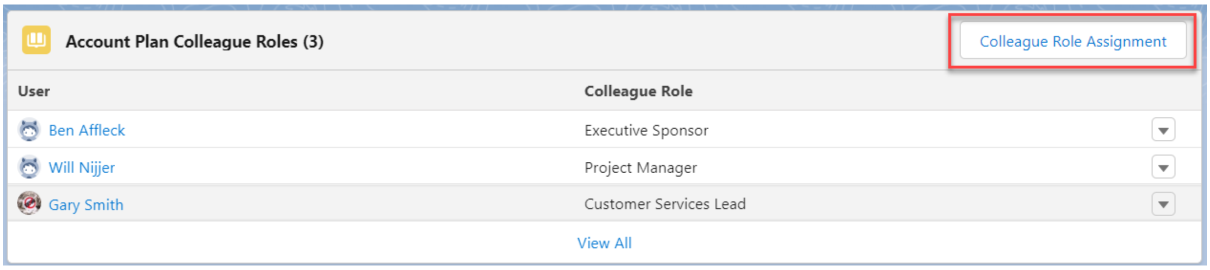
a) Go to Setup, Object Manager.
b) Scroll down to the Account Plan Partner Role object.
c) Click Fields and Relationships.
d) Click the Partner Type field.
e) Modify the picklist in the Values section.

3.6.4 Account Plan Colleague Roles

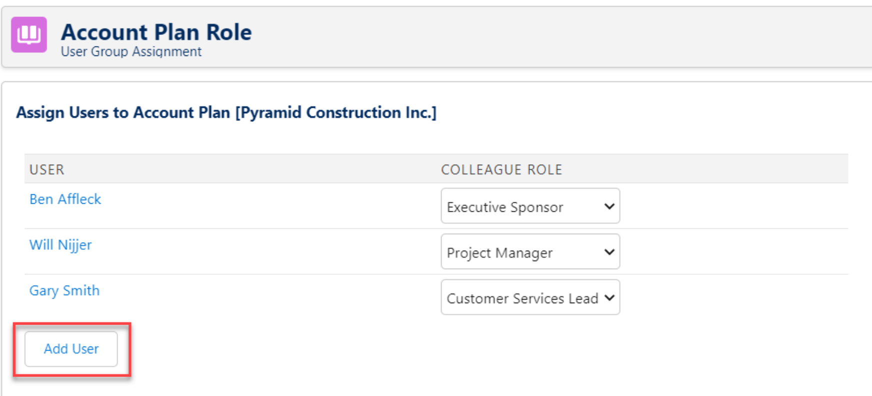
Now it’s time to identify your colleagues that will play a role on the Account Plan.

The purpose of this feature is to define the other people that will contribute to the success of your Account Plan. This way we are formalizing the contribution each person needs to play (rather than leaving it to chance!).

To get started, click the Colleague Role Assignment on the Account Plan Colleague Role related list.



Use the Add User button to link colleagues to the Account Plan and define their contribution using the Colleague Role picklist.



To customize the Colleague Role picklist:

a) Go to Setup, Object Manager.
b) Scroll down to the Account Plan Colleague Role object.
c) Click Fields and Relationships.
d) Click the Colleague Role field.
e) Modify the picklist in the Values section.

3.7 The Opportunity to Account Plan Relationship

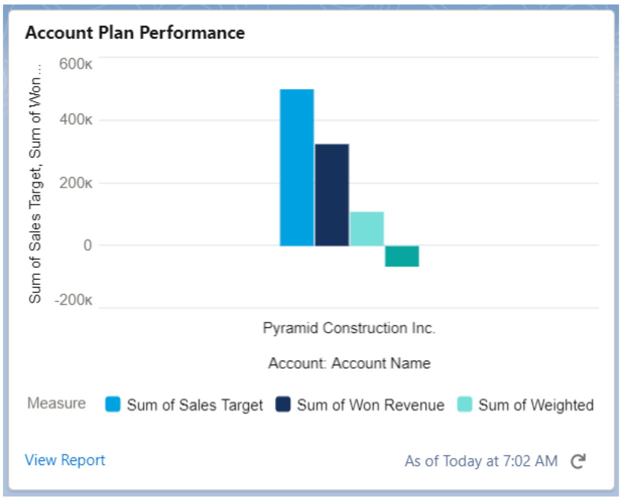
The KPI section of the Account Plan shows the value of opportunities linking to the plan. By default, the app rolls up the Amount field from the opportunities, but you can modify this to roll up custom fields.

Here's an example of the Amount fields rolling up to the Account Plan. With the exception of the Sales Target (which you populate manually), all fields calculate automatically.

KPI's

Sales Target	$500,000		
Won Revenue	$325,000	Target Achieved %	65%
Pipeline	$220,000	Pipeline as % of Target	44%
Weighted Pipeline	$109,000	Weighted Pipeline as % of Target	22%
Total Expected Revenue	$434,000	Forecast Target Achievement	22%
Forecast Target Variance	-$66,000		

You also get a great sense of the Account Plan performance using the embedded chart on the right:



The chart shows the Sales Target, revenue from won deals, the weighted pipeline value (Amount * Probability) of deals due to Close, and the Expected Variance (Sales Target minus won revenue and the weighted pipeline value).

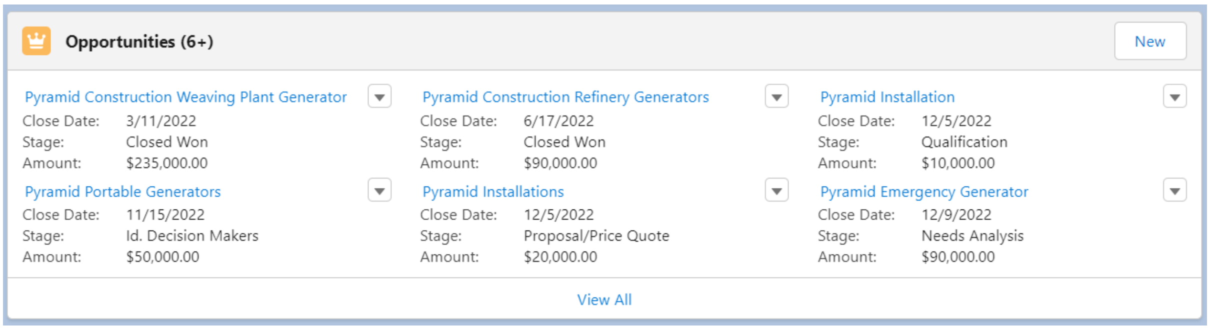
3.7.1 How Opportunities Link to Account Plans

An opportunity will automatically link to an Account Plan when:

a) The opportunity is on the same Account as the Account Plan, and
b) The Close Date of the opportunity falls within the From and To date fields on the Account Plan.

If the Close Date switches to a period outside the Account Plan dates, then the opportunity will unhook from the existing plan and link to relevant plan on the Account. (If no Account Plan exists for the period, the opportunity will link up when a plan is created).

To see the opportunities linking to the Account Plan, scroll down the page. Here's an example of what you should expect to see:



Bear in mind that opportunities from child Accounts do not link to Account Plans on the parent or top-level Account. This reduces complexity on the higher-level Account Plans. It also reflects the common scenario where you need separate Account Plans at the corporate HQ, and divisional or business unit levels.

3.7.2 Rolling up Custom Value Fields

By default, the values in the KPI section are based on the opportunity Amount field. That's because the standard Amount is the one field, we can guarantee everyone has in their Salesforce environment.

However, we have built flexibility into the app so that with some straightforward configuration you roll custom fields from the opportunity up to the Account Plan.

There's a four-step process for doing this, which we'll show you in detail. The three steps are:

1. Create **three formula fields** on the opportunity.
2. Drag your three opportunity fields into the **Field Set called GSP Account Plan** on the opportunity.
3. Create **three matching Currency** (not formula) fields on the Account Plan.
4. Add **Target and Variance** fields to the Account Plan.

We'll walk through this with an example. Let's say you have a custom field on the opportunity called ARR (short for Annual Recurring Revenue) and that the API Name for this field is ARR_c.

Create three opportunity formula fields

The first step is to create three formula fields with the type of Currency on the opportunity. These will store the won, pipeline, and weighted pipeline values for your custom field.

Here are the formulas you can use, based on our ARR field. You can substitute ARR_c with the API Name of your custom field.

Field Name	Formula
Won ARR	IF (IsWon = True, ARR__c , 0)
Pipeline ARR	IF (IsClosed = False, ARR__c , 0)
Weighted Pipeline ARR	IF (IsClosed = False, (ARR__c * Probability), 0)

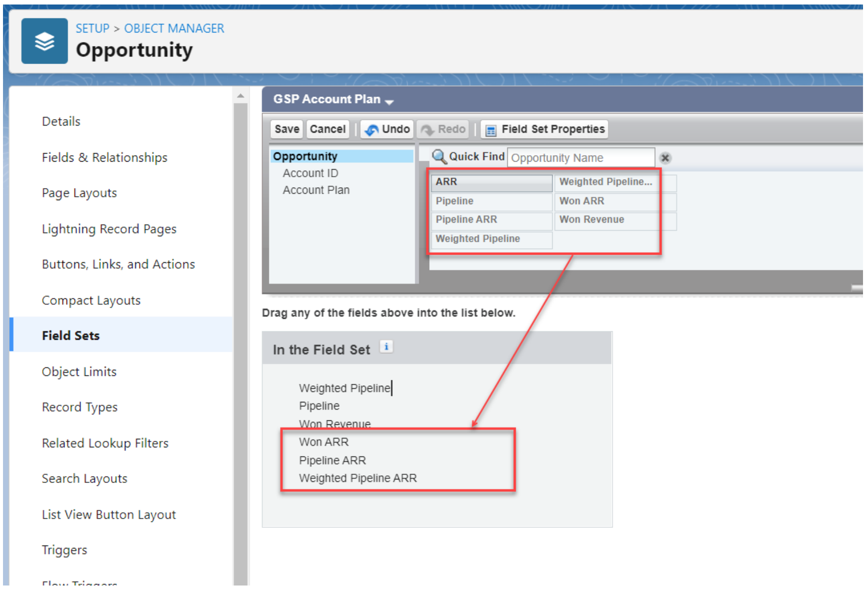
GSP Account Plan Field Set

Next, drag your three new formula fields onto the field set. To do this, click:

a) Setup.
b) Opportunity Object.

c) Field Sets.
d) GSP Account Plan.

Drag the three formula fields into the field set:



Don't forget to click Save on the Field Set.

Three Matching Currency Fields

Now create three new fields on the Key Account Plan object to store the values rolling up from the opportunity.

To do this, go to:
a) Setup.
b) Key Account Plan.
c) Fields & Relationships.

Now create your three Currency fields (not currency fields, just straightforward Currency fields). The critical thing is that these three fields have the **same API Name** as the fields on your Opportunity.

(The easiest way to do this is make sure the Label of each field matches the corresponding opportunity field. Salesforce will then create a matching API Name).

In each case, **enter 0 (zero)** as the Default Value when creating the fields.

By the way, bear in mind the fields on the Account Plan won't update until you make a change to an opportunity that fires the underlying trigger. To do this, temporarily change an opportunity stage or the value of your custom field.

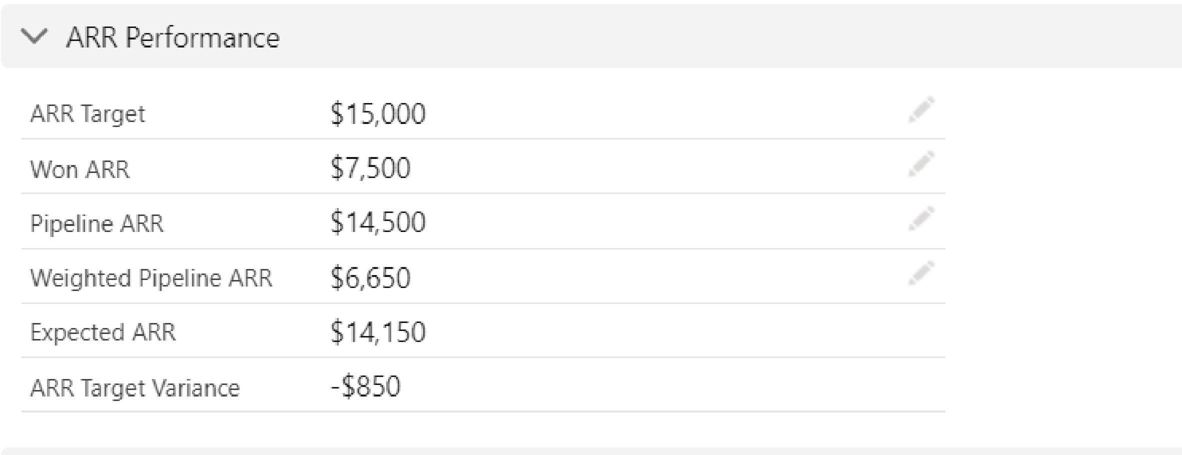
Target and Variance Fields

Finally, you probably want to create Target and Variance fields on the Account Plan.

To do this, create the following fields based on our example. You can substitute your own custom field values where appropriate.

Field Name	Type	Formula
ARR Target	Currency	n/a
Expected ARR	Formula (Currency)	Won_ARR__c + Weighted_Pipeline_ARR__c
ARR Target Variance	Formula (Currency)	Expected_ARR__c - ARR_Target__c

Here's what the final result looks like, after we've neatly grouped the fields together on the Account Plan page layout.



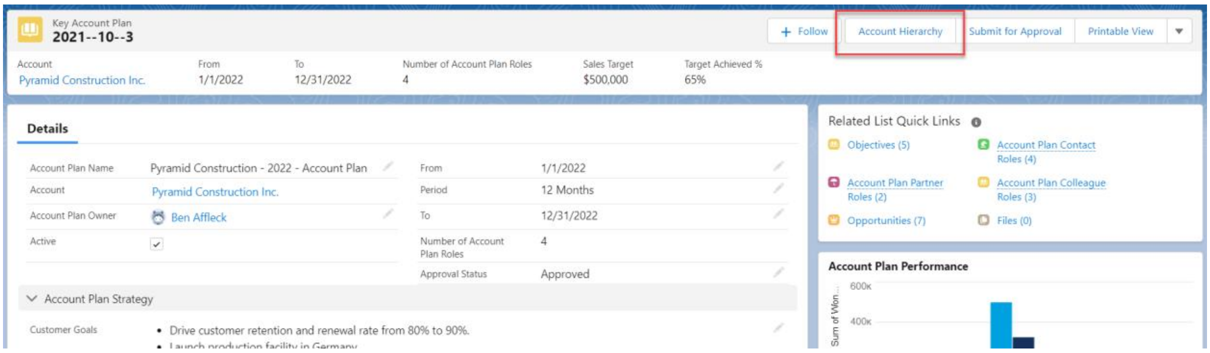
Remember, you'll need to make a change to the stage or value on an opportunity to initiate the trigger that rolls up the values from your custom field.

3.8 Account Hierarchy Page

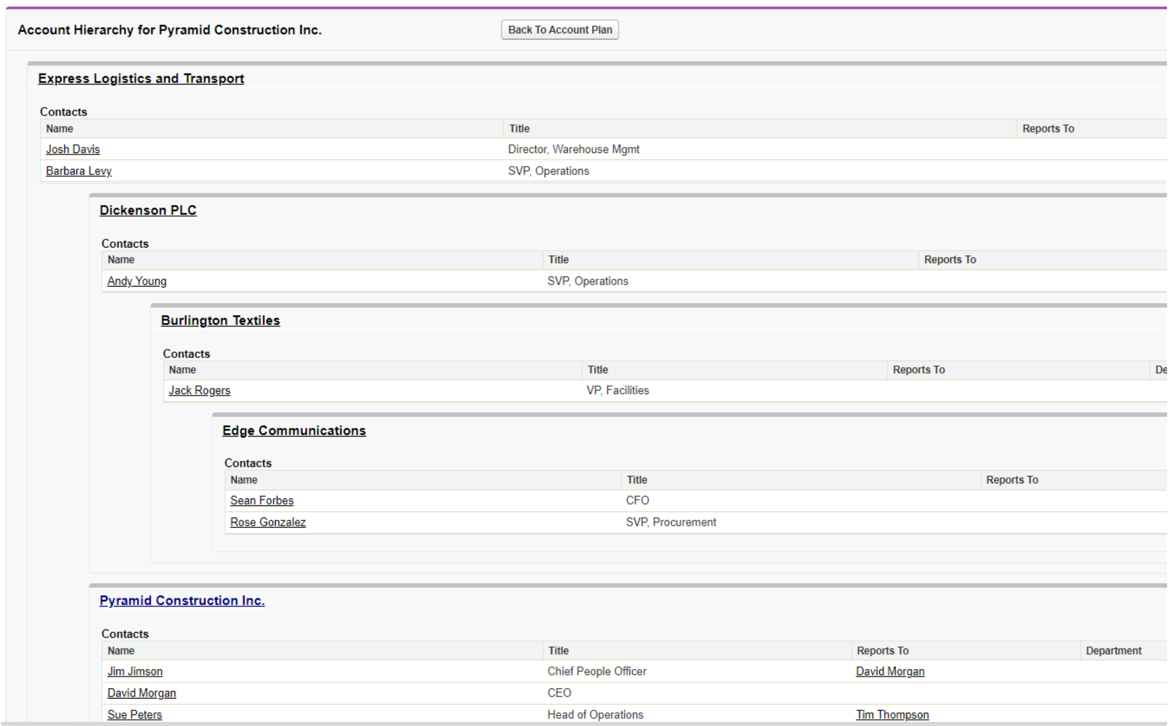
The Account Hierarchy Button opens a page shows you the parent-child relationship between companies within a group.

Note you need to initiate this page before clicking it for the first time, details below.

Here's the button on the Account Page Layout:



And an example of the resulting page:



You can see the page lists all the Accounts within the overall hierarchy, along with the associated Contacts.

3.8.1 Initiating the Account Hierarchy Page

The page relies upon the standard parent-child field on the Account. However, it uses this relationship to populate a new Account field contained within the page, Top-Level Account.

To initiate the page (you only need to do this once):

a) Click the Account Plan Setup tab.
b) Click the button Link Historical Accounts.
c) Click the link above the button to monitor the progress of the batch job.

The batch process will run, populating the Top-Level Account field upon which the Account Hierarchy page relies.

Pro tip: Temporarily switch off any Account validation rules when running the batch process. This reduces the chance that the Top-Level Account fails to populate because the data on an existing Account contravenes the validation rule.

Users will not be impacted by the batch process, and it is safe to run during normal business hours.

3.8.2 Customizing the Account Hierarchy Page

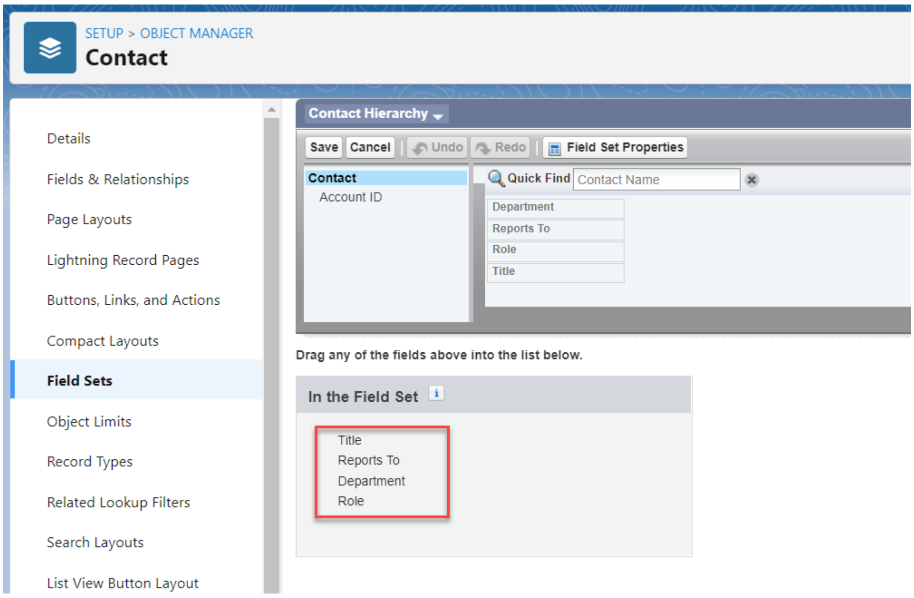
The Account Hierarchy page shows Accounts with related Contacts. For each Contact, a pre-defined set of data is displayed, including Title, and Reports To.

Nevertheless, you can customize the Contact-related fields that appear on the page.

To do this, go to:

a) Setup.
b) Object Manager.
c) Contact.
d) Field Sets.
e) Click on the Contact Hierarchy field set.

Drag any standard or custom field from the Contact into the field set:



The fields in the Field Set then appear for each Contact in the Account Hierarchy page.

3.9 Account Fields

The app includes the following Account level fields. Add some or all of these fields to your Account page layouts.

Field Label	Description
Current Segment	Use this picklist field in conjunction with Target Segment. Many companies track the current and desired status of Accounts using these two fields. The picklist values can be customized to suit the way your business segments its customers and prospects.
Target Segment	Use in conjunction with Current Segment, see above.
Top Level Account	An automated lookup relationship to the highest-level Account within a group of companies linked by the parent-child standard relationship. Use the batch process on the Account Plan Setup page to initiate this for existing Accounts.
Master Account	Text field that populates with the name of the Top-Level Account. Useful in reports and dashboard charts.

The following fields are deprecated: Account Call Frequency, Account Last Activity Date, Account Next Activity Date.

3.10 Reports and Dashboards

The app includes pre-built dashboards with underlying reports for the Lightning and Classic interfaces.

To view the Lightning Dashboard:

a) Click the Dashboards tab.
b) Navigate to All Folders on the left.
c) Select the Account Planning Folder.
d) Click the Account Planning (Lightning) Dashboard.

The dashboards contain multiple charts that report performance on Sales KPIs and Objectives.

You can add a filter to the dashboard in the usual way (click Edit on the dashboard, then Filter). The dashboard layout can be edited using the standard Edit button.

The reports can be used to create additional components on other dashboards.

We recommend that before customizing any reports, you select Save As and create a clone of the report. This allows you to modify the report and adapt it to your specific business.

4 Additional Account Planning Resources

Here's where you can find more resources and information to help you drive maximum benefits from the GSP Account Planning app:

How To Build Key Account Plans That Actually Work. Blog post showing the GSP Account Planning app in action, along with tips and guidance.

10 Account Planning Best Practice Tips. Recommendations on maximizing the impact and benefits of Account Plans.

5 Get More Help

Don't hesitate to get in touch if you have any questions about the GSP Account Planning App.

It's easy to do.

Go to our website and enter your details into the *Contact Us* form. We'll reply to you and arrange a good time to talk.