Account Planning Roles and Insights

Here's a sample framework for use in Account Planning:

TEAM MEMBER	ROLE	RESPONSIBILITY
Account Executive	Team Lead	Leads Meeting; includes time management and assigned actions
Marketing Campaigns & Sales Development	Campaigns Lead	Advises on campaign type, offers, and execution plan
Executive Sponsor	Sponsor	Approves campaign plan

INSIGHTS COLLECTED			
The Market	The Company	The Business Unit	The People
Marketing	Sales		

▶ Industry dynamics
▶ Key Trends
▶ Competitors
▶ Growth drivers & inhibitors
	▶ Financial health
	▶ Growth Areas vs 'Cash Cows'
	▶ Renewal Risk
	▶ SWOT
	▶ Initiatives and organization priorities
	▶ Triggers
	  ▶ Funding, acquisitions, personnel moves
		▶ Org Chart
		▶ Key buying centers
		▶ Whitespace within buying centers
			▶ Key contact profiles
			  ▶ Decision
			  ▶ Influencers
			  ▶ Mobilizers
			  ▶ Blockers
			▶ Relationship to each other
			▶ Relationship to company
			▶ Attitudes, preferences, biases

Setup "Account Teams"

1 Tactical Breakdown

Account Executive led groups who will manage the account.

Each team should include roles like the dedicated sales development rep, an account manager, a marketing manager, and an executive sponsor. These teams are accountable for driving business for a specific account and are assigned various activities against specific prospects within the account. Scrum-style iteration and management is a perfect match to ensure that everyone is working within a defined timeframe, toward the same goals.

Unlike more traditional practices, we won't pass the baton from one team member to another. Instead, we will all work in tandem throughout the process to ensure account-based selling success.

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Establish Quarterly Account Reviews

2 Tactical Breakdown

Account planning sessions are to be lightweight and agile, allowing the team to quickly prepare for, and respond thoughtfully, to unique needs of a target account. These sessions should be insight and data driven, while allowing the entire team to focus on the needs of target accounts.

ACCOUNT PLANNING	
Overview	Gather account/insights that will inform campaigns
Elements	▶ Automated Intelligence ▶ Human Intelligence ▶ Recurring insight reviews
Key Activities	▶ Account Teams ▶ Quarterly account reviews ▶ Bi-Weekly Planning SCRUM
Objective	2-3 Insights for 100% of accounts

Establish a Bi-weekly SCRUM

The goal of each bi-weekly SCRUM is to track against progress toward the goals we established at our quarterly sessions. What is the progress? What are the blockers? The SCRUM format allows for hyper-value in a very short amount of time. With a controlled and mechanical touch base, we can quickly ensure that we are still tracking toward our overall targets and remove anything standing in the way. Gone is the old major account list build that happens once, maybe twice per year.

INSIGHTS COLLECTED			
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	▶ *Financial health*
	▶ *Growth Areas vs 'Cash Cows'*
	▶ *Renewal Risk*
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			▶ *Relationship to each other*
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			▶ *Attitudes, preferences, biases*

[1] ***What's SCRUM?*** SCRUM is an agile project management model based on multiple small teams working in an intensive and interdependent manner. The term is named for the scrum (or scrummage) formation in rugby, which is used to restart the game after an event that causes play to stop, such as an infringement.