

ACCOUNT PLANNING SOLUTION

to accelerate growth with global accounts

**North American logistics and transportation company with
\$6 billion annual revenue**

CLIENT'S SITUATION



- ☑ No formal account planning tool, process or methodology for 200 top customer accounts
- ☑ Limited effort and infrequent use of Powerpoint-centric account plans for only a handful of accounts
- ☑ No formal connection between annual account growth and how global account manager's activities did/did not contribute to goal achievement

THE SOLUTION



Sales Outcomes designed, introduced and deployed an Account Planning program to the client's global account team. The engagement included all aspects of the Account Planning process, methodology, training and Salesforce.com tool implementation. Key services we performed included:

- ☑ Development of account plan template, to include specific, measurable activities and goals to drive account growth
- ☑ Incorporated account planning as critical aspect of opportunity and pipeline management by sales leaders and global account managers
- ☑ Delivered immersion training to 50 global account managers
- ☑ Ongoing group coaching to global account managers
- ☑ 1-on-1 coaching to sales leaders to ensure account planning was adopted, impactful and durable

OUTCOMES



- ☑ Doubled strategic proposals over a 6 month period
- ☑ Successful launch of 4 'pilot' account plans