

Account Planning is a Team Sport *by Marty Levy*

How do you approach account planning? Is it an individual or a team sport?

Michael Jordan and LeBron James couldn't win without great teams behind them. Similarly, even superstar Account Managers need a team of supporters behind them to succeed.

When doing account planning we tend to focus on having the Account Manager develop "his/her" plan. Shouldn't the entire account team be involved in building the account plan for your most important customers?

The responsibility for developing an Account Plan resides with the Account Manager. Certainly, s/he must be the primary owner of "the plan" and likely in the best position of knowledge and influence to determine the "winning formula."



There are however, other people in your organization who serve as members of the account team. These may be other players in sales or represent various other groups within your company. They provide valuable perspectives on the account strategy and often, critical support in the execution of the Account Plan. Their input is vital to success with the account. They must be participants in account planning.

Account planning is a process.

Creating an Account Plan should be approached from its inception as a dynamic and constantly changing document that defines the strategy and the evolution of plans for winning at a specific account. It is also a document that has the whole team involved in its development and maintenance. The best Account Plans are a blueprint that every member of the account team believes in and supports, thereby ensuring the greatest chance of account success.

The Account Manager maintains his leadership role with the plan over time. S/He provides new information and adapts the plan to changing situations. S/He must also be the lead communicator to the team on progress, new requirements, and changing situations. These updates allow teammates to impact the changes needed to the plan and the adjustments to be made in their support. This process ensures that the goals of the original Account Plan are met even, when the plan changes.

Accounting Planning is a team sport that requires continuous input of its players.

Every team has their point player; Each player on the team has a role. Even the best Account Managers need a strong supporting team. The Account Manager must manage the account planning process. It's "his account," but the team's Account Plan.

Marty Levy has submitted this blog as a guest of Plan2Win Software.

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