Objective

You now have the ability to pull all of the essential pieces of an account plan together in one place – using existing information that you already have in Salesforce.com. This way you can create and implement account plans and strategies to win greater share of the potential business in your account!

This is a step-by-step manual to help you get up-to-speed fast and begin benefiting from improved territory planning.

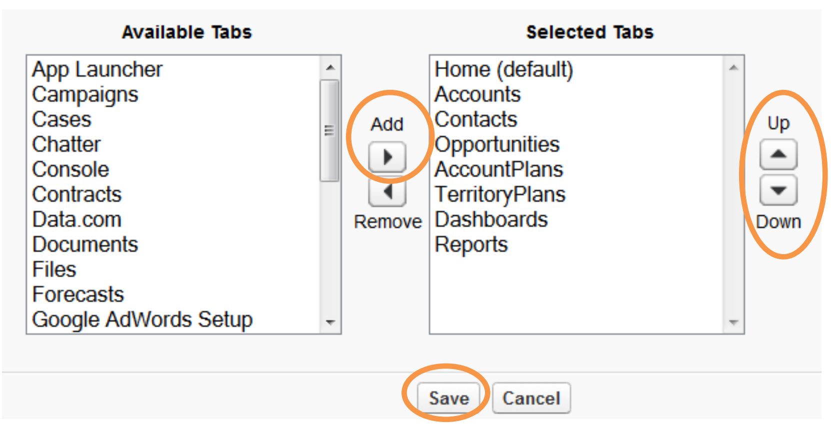
The AccountPlan Tab

One of your tabs should be setup to display: AccountPlans

Note: If you do not see this in your tab list, you can add the tab with these steps:

1) Click the "+" icon at the end of the tab list.
2) Click the "Customize my tabs" button on the 

far right.
3) Locate the "AccountPlans" item in the Available Tabs box on the left
4) Click the "Add" > button
5) Position the item in the "Selected Tabs" list in the order preferred using the up/down buttons. (optional)

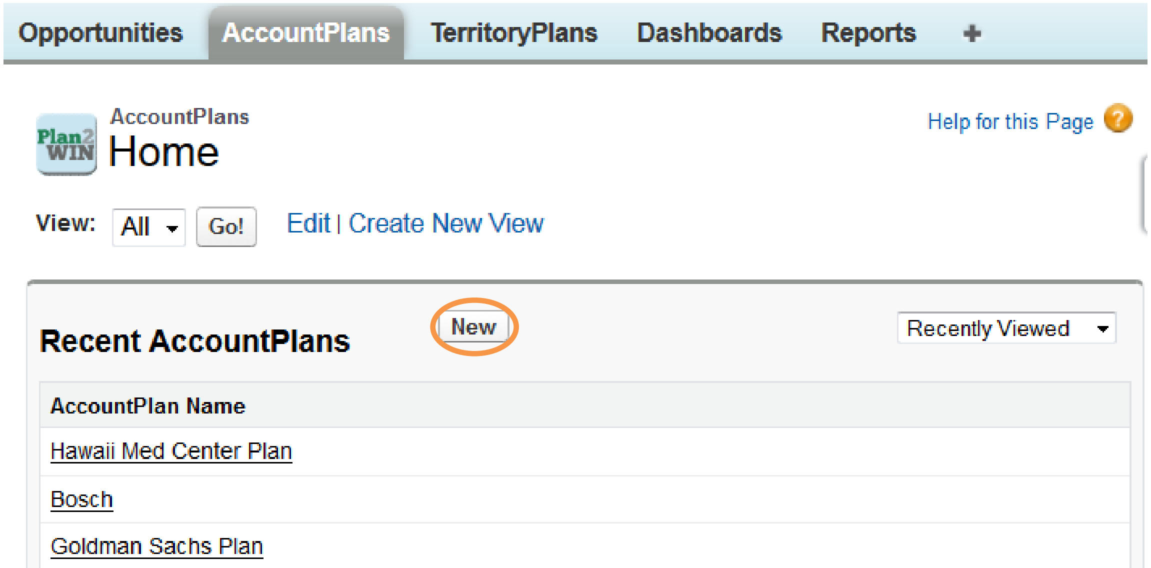


6) Save changes

You will now see the tab at the top of your Salesforce screen.

Creating an Account Plan

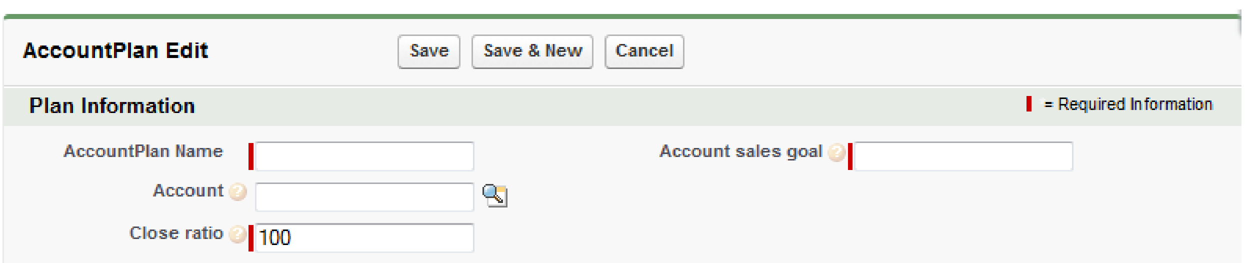
From the new AccountPlans tab, click the “New” button to create your plan.



After clicking the “New” button, you will be brought to an edit screen where you can begin to fill in several details. Fill in as much as you can initially; you will be able to update the information again later by clicking “edit” in the top menu.

Plan Information

In this section, fill in the required fields (those with a red line to the left of the text fill in box).
First, give your plan a name. It should include your account name.
Your Account Sales Goal should come from your assigned sales goal, comp plan.
Adjust your close ratio to reflect your best estimate. 100% close ratio is the default.

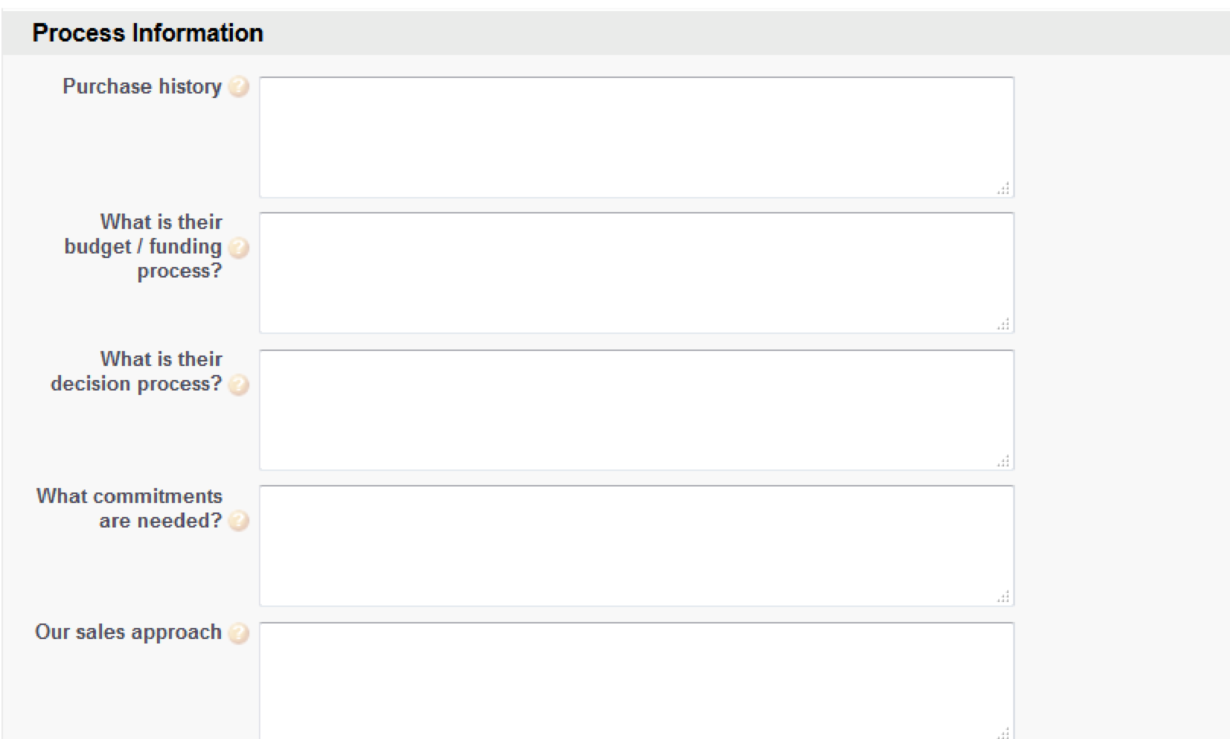


Situation Overview

In this section, include any facts regarding the account in the text fields.

Process Information

In this section, fill in process information regarding your account.



Narrative

The narrative is a description of your account. You can also include any additional issues or factors regarding your account in this section.

Save

Once you have added your information, save your plan or click save and new to save and create a new plan.

Note to User

A few items to note:

- The "Sum of Closed Opportunities" and "Sum of Open Opportunities" simply sums of the values you have entered into the opportunity amount.
- "Close Ratio" (close rate) is the percentage of deals that go from opportunity to close.
- The information in your account plan must be maintained on a regular basis in order to remain accurate and beneficial.

Buttons

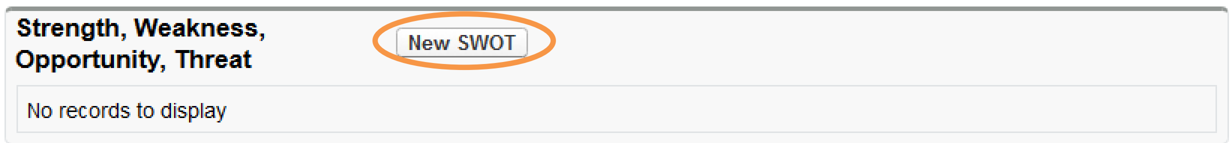
These buttons, at the top and middle of the Account Plan page, enable you to:

- Edit or Delete the plan
- Clone the top section of the plan
- Generate a pdf of the plan that can be saved or sent to an appropriate person
- Associate Opportunities you want to include in the plan
- Bring Contacts that are in the Account Object into the Relationships section of the plan

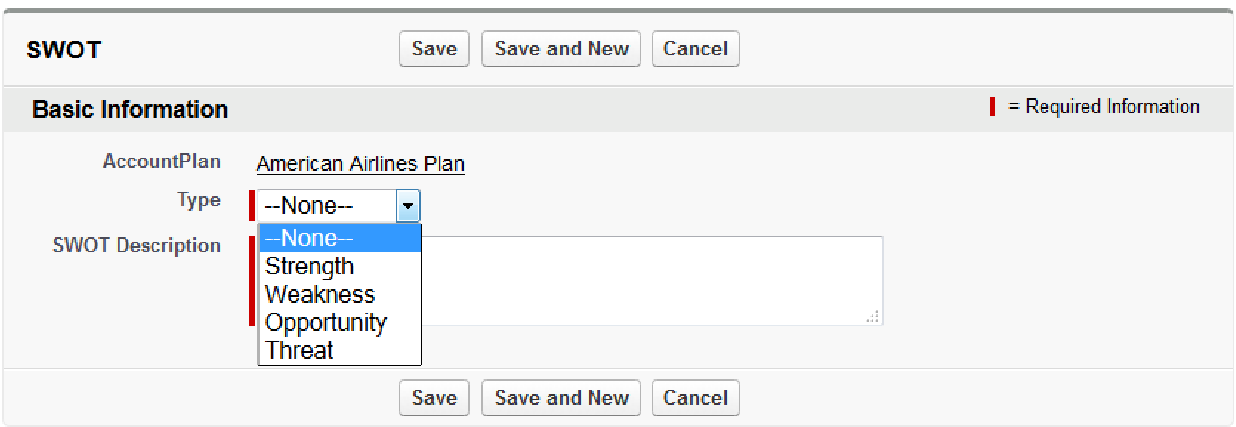
SWOT, Strategies, Activities

SWOT (Strength, Weakness, Opportunity, Threat)

Here you can track overall SWOT items for your account. Click the "New SWOT" button create new items in your plan.

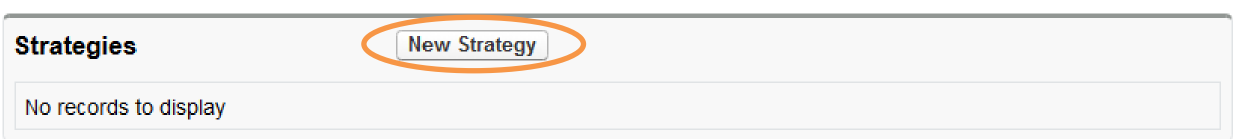


On the SWOT screen, select the correct type (Strength, Weakness, Opportunity, Threat) and then add your description. Save each item when finished. You can choose "save and new" to create a new SWOT.

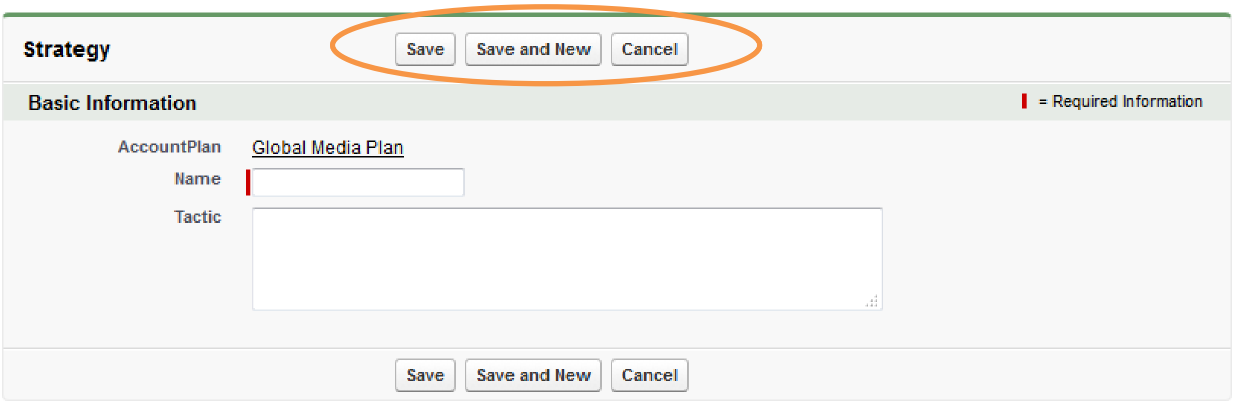


Strategies

Here you can track overall account strategies and tactics. Click the "New Strategy" button create new items in your plan.

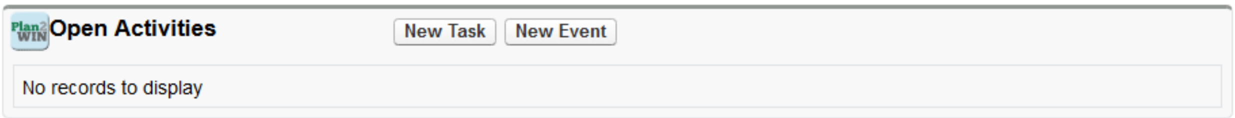


On the Strategy item screen, enter your strategy name and then add the associated tactic. Save each item when finished and repeat as needed.



Activities

The Account Plan allows you to track Tasks and Events attributed to your plan. These function just like the activities elsewhere in Salesforce.



Opportunities

Bringing in Your Opportunities

As part of your account plan, you will be selecting your key opportunities to "bring into the plan."

At the top and middle of the account plan main page, there is a button that enables you to bring in all of your opportunities associated with this account (this is not always the case as it may include some opportunities that should not be in this plan).

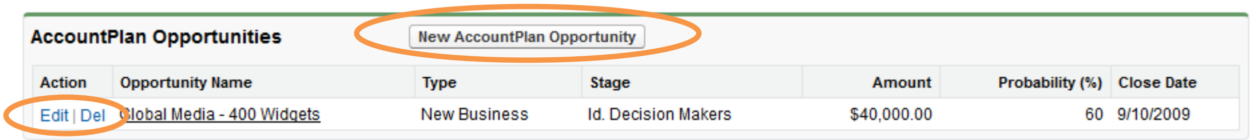
The other alternative is to use the New AccountPlan Opportunities button in the AccountPlan Opportunities section (see below).

Important Note

Add opportunities into your plan as you create new opportunities to keep your plan up to date.

Account Plan Opportunities

Back on the account plan screen, scroll down to the "AccountPlan Opportunities" section. Here you can review the list of opportunities that you selected. This list allows you to see more detail about your opportunities. You can click the "Del" link to remove any that don't belong.
You can also click the "New AccountPlan Opportunity" button and bring in one new account into the plan. You will receive an error message if you try to add opportunities that are not associated with the account of the account plan.

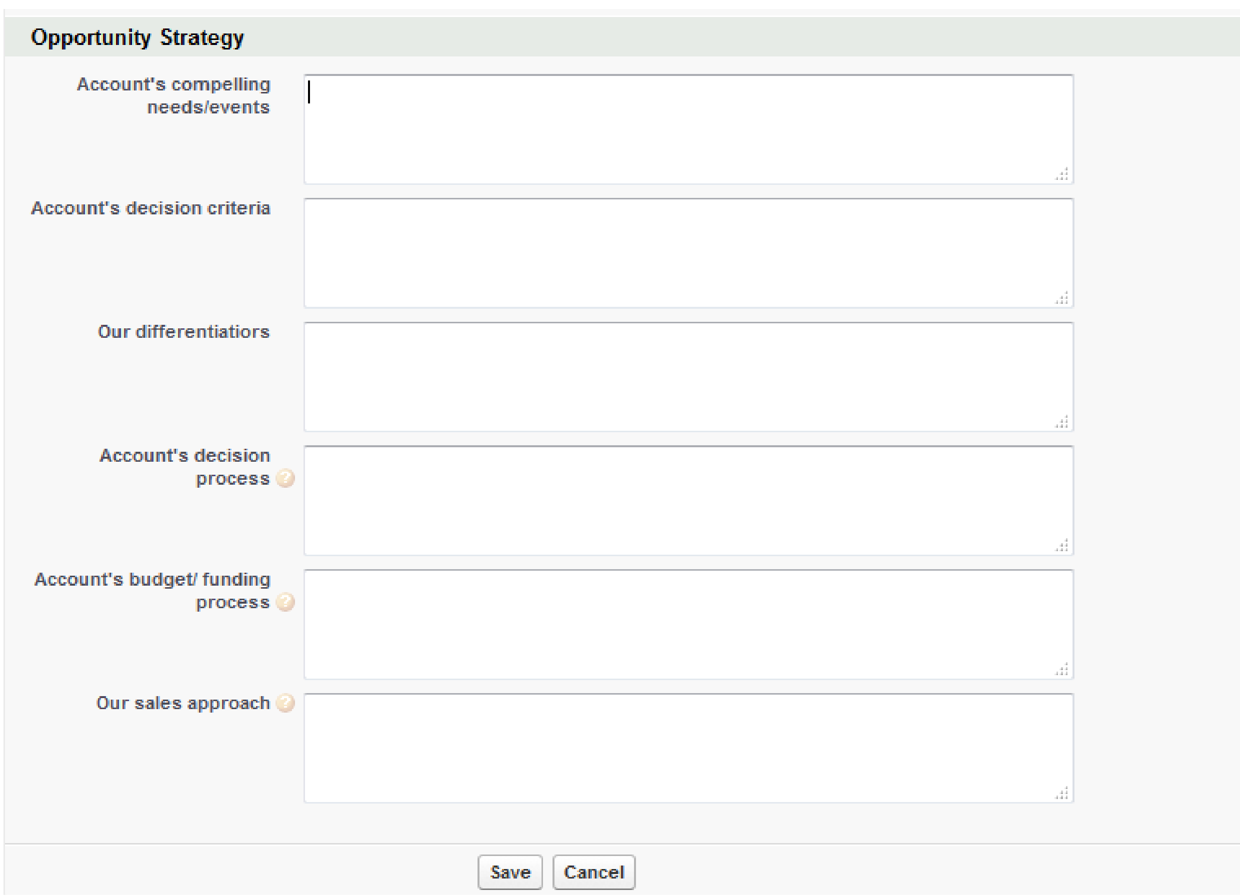


Updating Opportunity Details

With your opportunities selected, it is time to update the details. From the Target Opportunity list, click the "Edit" link next to the opportunity you wish to update (see above).

Opportunity Strategy

In this section, you will need to fill in several strategic fields regarding the opportunity. Help tips are provided to guide your input. Click Save when done.

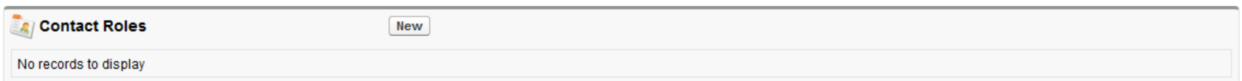


Important Note
After you save the Opportunity Strategy for the first time, two additional sections will appear below (see next page).
When you edit your Opportunity Strategy, be sure to update and save your strategy information (above) before entering information in the screen section below… as indicated on the page:

Opportunity Details continued

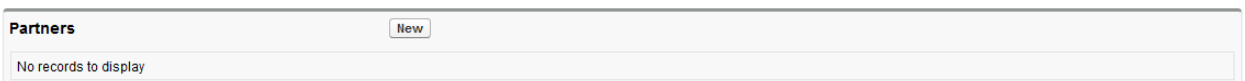
Contact Roles

This section will bring in Contact Roles from the Opportunity object and you can add new contact roles that will show up on this screen.
Click Save when done.



Partners

This section is the same on the Opportunity itself. Any changes here will reflect on your opportunity as well (and vice versa).
Click Save when done.

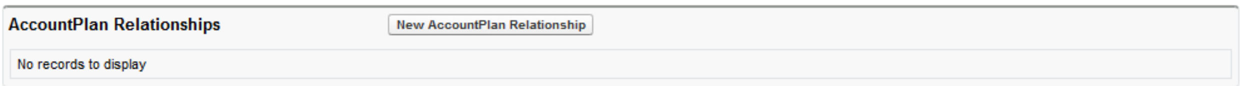


Other Features of the Account Plan

From the main Account Plan screen, there are a few other features.

Account Plan Relationships

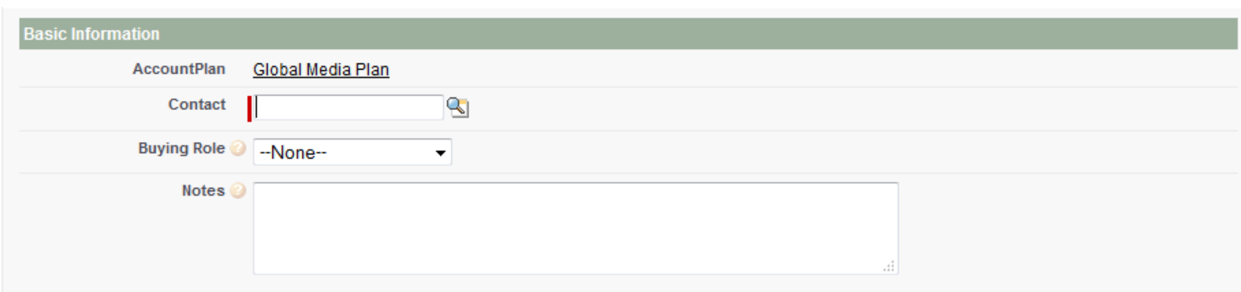
In this section, you identify the key relationships in the account and create a relationship strategy. Either click the New AccountPlan Relationship button to add a new contact to the plan or click the edit button to the left of a contact that is already in the plan… to create the relationship strategy.



When you have added the information, it will be reflected in the Target Account section on the Account Plan page.

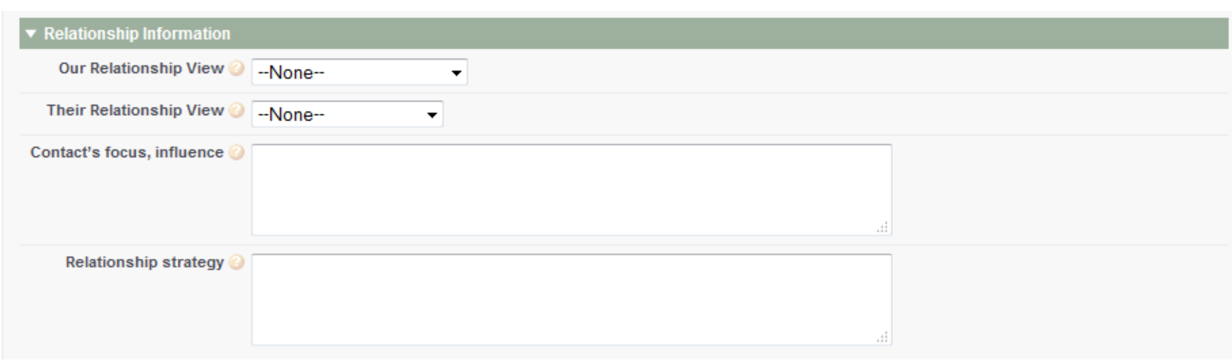
Basic Relationship Info

Enter the Contact's name and Buying Role.



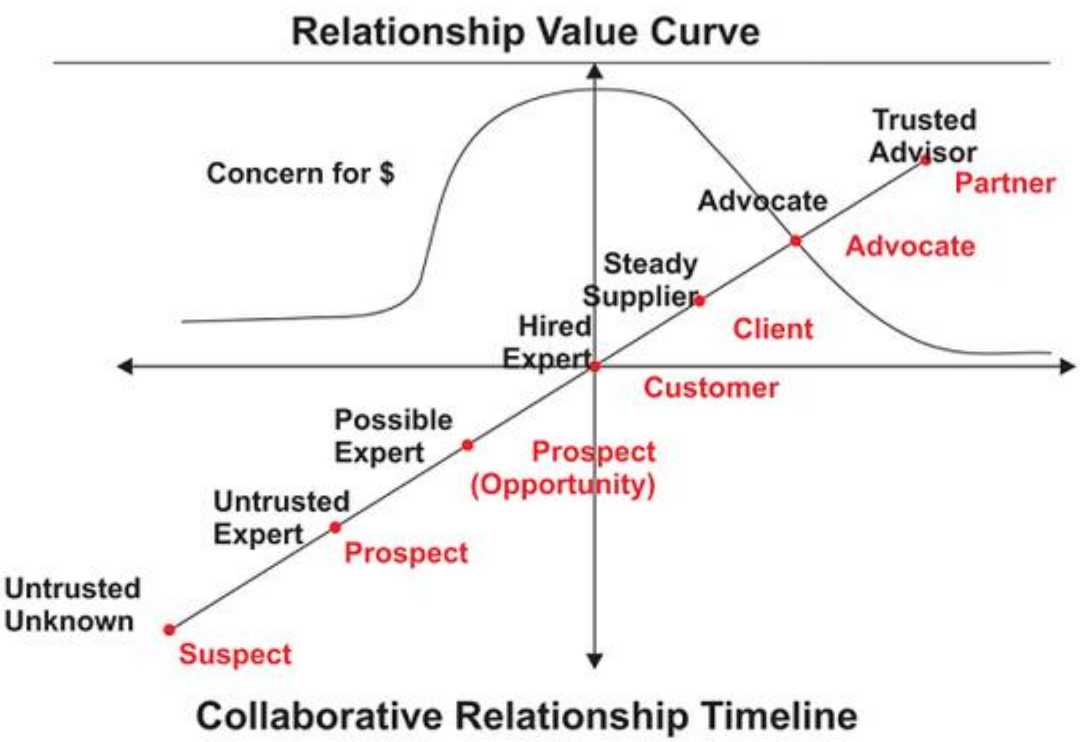
Relationship Strategy

Enter the key elements of the Relationship Strategy. Click Save when done.
Click Save when done.



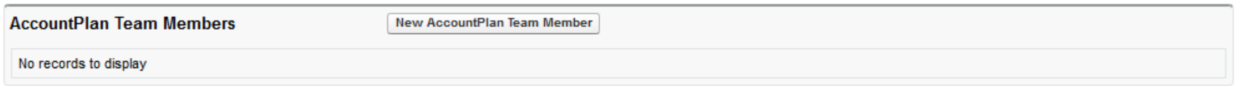
Relationship Value Curve

The Relationship Curve traces how the buyer's concern for Dollars increases as they approach buying for the first time and decreases as they have more experience with you and your organization. You can reflect where you and the buyer are on this curve in the Relationship Strategy section above.

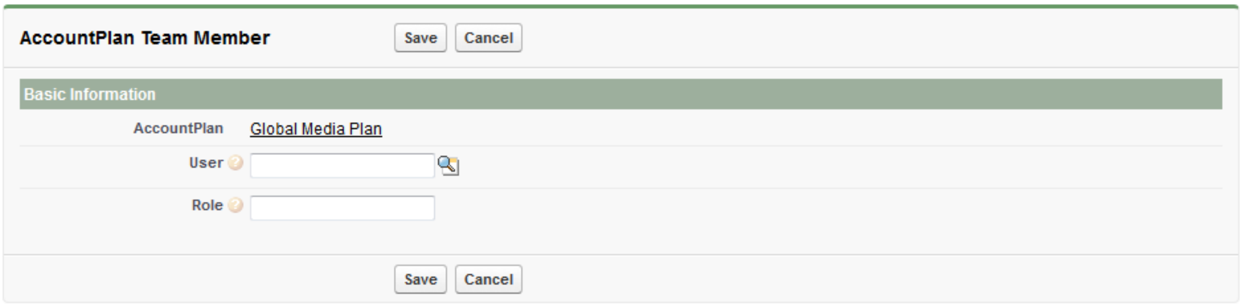


Account Team Members

Here, you can include team members and assign them roles that are visible on the plan for other team members to see.

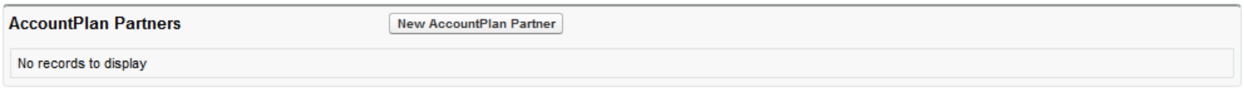


After you click "New Account Plan Team Member, you will get this screen to fill out.
Click Save when done.



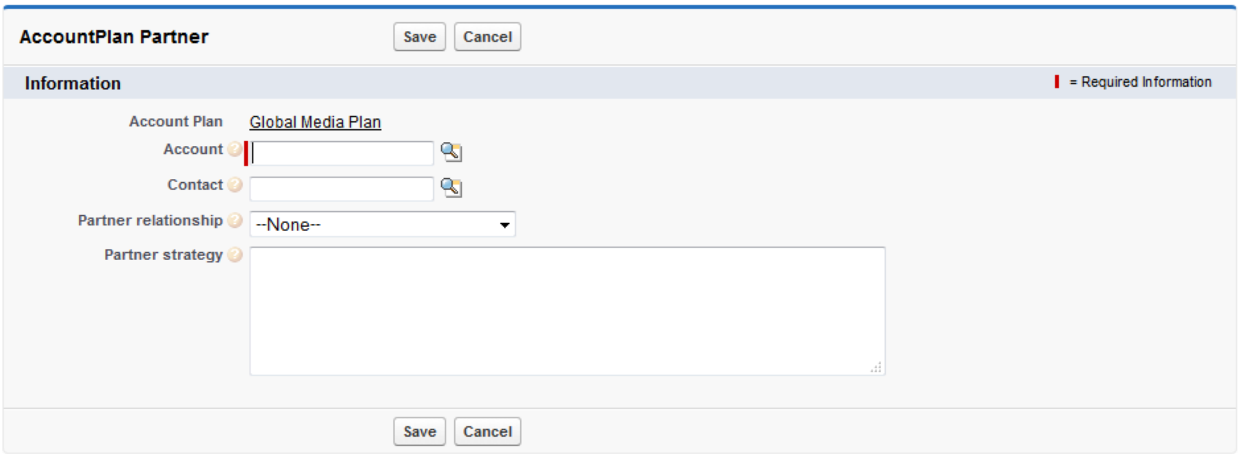
Partners in your account

Similar to tracking partners on specific opportunities, you can also track partners more broadly as applied to your Account. To add a new Partner to your plan, click the "New Partner" button.



Partner Information

Note: the partner must be an account in Salesforce. Select it in the Account field- you can use the look up. You can also select your main contact at this partner. Identify your relationship, value, and strategy, and then save your changes. Save and repeat for all partners you wish to track in the plan.
Click Save when done.



Activity History

A history of the activities that were registered in the plan will be saved in this section.