

**Account Plan: Hawaii Med Center Plan**

Generated: 07-11-2014

**Plan Information**

Account name	Hawaii Med Center	Account sales goal	\$1,500,000
Close ratio	50%	Sum of closed opportunities	\$150,000
		Additional sales from existing base	\$100,000
		New sales needed	\$1,250,000.00
		Pipeline needed	\$2,500,000
		Sum of open opportunities	\$1,000,000
		Pipeline gap	\$1,500,000

**Behavior and Territory Goals**

**Account Goal #1**

Build our presence in the account by penetrating general imaging

**Account Goal #2**

Increase our share in the ER from 40% to 60%

**Account Goal #3**

Penetrate cardiology ultrasound

**Account Goal #4**

Build our executive level contacts

**Situation Overview**

**Describe their business**

Largest Medical Center in Hawaii

**Industry trends impacting their business**

Movement toward outpatient clinics

**Key trends in the geography**

Economy picking up

**Account's strategic initiatives**

Build a stronger general imaging business

**Process Information**

**Purchase history**

Have bought our products in the ER

**What is their budget / funding process?**

GI dept mgr and Drs present recommendation to capital equip purchase committee; approved by CFO

**What is their decision process?**

GI dept mgr and Drs review vendor presentations, selection committee decides

**What commitments are needed?**

Vendor selection and \$ in budget

**Our sales approach**

Leverage our product strengths, flexibility and value

**Narrative - Account Overview**

Leverage our product strengths and success in the ER

---

**SWOT**

**Strengths**

product capabilities, flexibility and value

**Opportunities**

leverage our unique capabilities

**Weaknesses**

limited number of luminary references

**Threats**

competition coming out with strong product and aggressive pricing

---

**Strategies**

---

**Strategy** Build exec level contacts

**Tactic** ID list of 5 contacts

---

**Strategy** Build Share of Wallet  
**Tactic** leverage current installed base

---

**Strategy** increase % of spend  
**Tactic** ID 5 new Opportunities

---

**Strategy** leverage current successes  
**Tactic** work with current customer

---

## AccountPlan Opportunities

---

**Opportunity** Ultrasound: GI  
Amount 700000.0  
Stage Value Proposition  
Close date Sep 05 2014

**Account's compelling needs/events**  
Need better image quality

**Account's decision criteria**  
image quality ease of use price

**Our differentiators**  
image quality ease of use

**Account's decision process**  
side by side demos committee recommends Exec approves

**Account's budget/ funding process**  
Dept manager submits budget CFO approves

**Next steps**  
set up patient criteria for demo; do great demo work with champion to influence committee decision

---

**Opportunity** Ultrasound: Cardiology  
Amount 300000.0  
Stage Needs Analysis  
Close date Sep 30 2014

**Account's compelling needs/events**  
Need to be able to perform new procedures

**Account's decision criteria**  
Image Quality Price Service

**Our differentiators**  
New technology

**Account's decision process**  
Review top 3 products Top 5 people decide what to recommend Committee approves: Dr Jones, Dr Smith

**Account's budget/ funding process**  
Dept Manager submits proposal Funding Committee approves

**Next steps**  
Leverage our product strength and success in the ER Meet with Director of Cardiology Ultrasound Influence decision criteria

---

**Opportunity** Ultrasound: ER  
Amount 150000.0  
Stage Closed Won  
Close date Jun 23 2014

**Account's compelling needs/events**  
Need basic unit for ER

**Account's decision criteria**  
Price Service

**Our differentiators**  
New technology can do many procedures

**Account's decision process**

Review top 3 products Top 5 people decide what to recommend Committee approves

**Account's budget/ funding process**

Dept Manager submits proposal Funding Committee approves

**Next steps**

Leverage product strength- influence decision criteria- and success in other ER's

---

**AccountPlan Relationships**

---

**Contact Name** Eric Newman**Title** Radiologist**Email****Phone****Buying Role** Technical Evaluator**Our Unique Value to them**

Likes new technology

**Contact's Focus, Influence**

Dept looks to him to stay on top of latest technology

**Relationship Strategy**

Show him we have the best, latest technology

**Our Relationship View**

Prospect (Opportunity)

**Their Relationship View**

Possible Expert

---

**Contact Name** Josie Wester**Title** Rad Dept Mgr**Email****Phone****Buying Role** User**Our Unique Value to them**

concerned re change that will create inefficiencies

**Contact's Focus, Influence**

wants to make sure the dept runs smoothly

**Relationship Strategy**

show how smoothly other departments run with our equipment

**Our Relationship View**

Prospect (Opportunity)

**Their Relationship View**

Possible Expert

---

**Contact Name** Tom Duly**Title** CIO**Email****Phone****Buying Role** Advisor/Coach**Our Unique Value to them**

Big ego

**Contact's Focus, Influence**

Look smart

**Relationship Strategy**

Make it look like he brought in great technology

**Our Relationship View**

Prospect (Opportunity)

**Their Relationship View**

Possible Expert

---

**Contact Name** John Splatt  
**Title** CFO  
**Email**  
**Phone**  
**Buying Role** Decision maker  
**Our Unique Value to them**  
focused on bottom line  
**Contact's Focus, Influence**  
ROI  
**Relationship Strategy**  
show ROI  
**Our Relationship View**  
Prospect  
**Their Relationship View**  
Untrusted Expert

---

### Account Partners

---

**Partner** Philips Healthcare  
**Contact name** George Remo  
**Partner relationship** Strategic Alliance (Local)  
**Our Value to Them**  
great products  
**Their Value to Us**  
provide services our customer needs  
**Partner strategy**  
work together to grow account business

---

### Team Members

---

**Name** Nilesh Shroff **Role** technology expert

---

### Tasks

---

**Name**  
**Subject** Build exec level contacts: ID list of 5 contacts  
**Priority** Normal  
**Status** Not Started  
**Due date** 06-06-2014 00:00:00  
**Comments**  
Strategy:Build exec level contacts Tactic:ID list of 5 contacts

---

**Name**  
**Subject** leverage current successes: create target list  
**Priority** Normal  
**Status** Not Started  
**Due date** 07-11-2014 00:00:00  
**Comments**  
Strategy:leverage current successes Tactic:create target list

---

**Name**

**Subject** increase % of spend: ID 5 new Opportunities  
**Priority** Normal  
**Status** Not Started  
**Due date** 07-18-2014 00:00:00  
**Comments**  
Strategy:increase % of spend Tactic:ID 5 new Opportunities

---

## Events

---

**Name** Alice Harmony  
**Subject** leverage current successes: call Alice  
**Location**  
**Start date** 01-11-2014 15:55:00  
**End date** 01-11-2014 15:55:00  
**Description**  
Strategy:leverage current successes Tactic:work with current customer

---

**Name** Eric Newman  
**Subject** penetrate new BU: talk w Eric  
**Location**  
**Start date** 05-15-2014 15:43:00  
**End date** 05-15-2014 15:43:00  
**Description**  
Strategy:penetrate new BU Tactic:ID contacts to call

---

**Name** Alice Harmony  
**Subject** sell new service  
**Location**  
**Start date** 06-27-2014 20:17:00  
**End date** 06-27-2014 20:17:00  
**Description**  
Strategy:sell new service Tactic:ID candidates for the service

---

**Name** Eric Newman  
**Subject** Build Share of Wallet: Meet Eric re new product  
**Location**  
**Start date** 07-25-2014 22:00:00  
**End date** 07-25-2014 23:00:00  
**Description**  
Strategy:Build Share of Wallet Tactic:leverage current installed base