Design Document

Strategic Account Snapshot™

Learning Solutions International

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Strategic Account Snapshot™
(SAS)

One Day Workshop for Account Teams and Sales Professionals
Design Document

Strategic Account Snapshot (SAS) is a one-day, fast-paced interactive workshop that represents the next generation in account planning. It focuses on helping professional salespeople optimize the planning process for their strategic accounts.

The Strategic Account Snapshot (SAS) workshop is based on proven 'best practice' account planning and management techniques. Its unique design provides for a highly efficient use of the account team's time and a maximum return on the resources they invest in their most strategic accounts. SAS gives today's sales organization a practical how-to set of guidelines geared to the realities of the high-demand, fast-paced world they live in. Every element of the SAS planning process has passed the '***No Wasted Motion***' test.

The workshop content is supported by a robust planning tool *(SAS Software Tool)* created and developed using Visual Basic within Excel. The tool is extremely visual, easy to use and dramatically depicts various components of an account plan, including the following:

- Identification of the critical *Business Units* and *Support Units* that are contained within the strategic account
- Outline of the *key revenue growth opportunities* (On-going, known new and unqualified new opportunities) within the account
- *Organization Map,* reflecting the account team's knowledge of the key executives within the client organization
- *Influence Map*, consisting of an overview of key client executives who project a level of influence within the client organization, as it relates to major buying decisions
- *Relationship Map*, which outlines the one-on-one relationships between client executives and members of our core and extended team
- An *Action Plan* aimed at identifying the short-term actions (60-90 days) required to validate the top sales opportunities identified within the strategic account

A portion of the *tool* is forwarded to all direct and extended members of the account team in advance of the workshop so that selected elements of the account plan can be completed before the account team arrives at the one-day SAS workshop. The *Account Plan Snapshot*, once completed, can also be used to prepare and update sales executives who might be asked to call on various executives in the client organization.

In addition to the *SAS Software Tool*, the *SAS Resource Guide* is also made available to participants in advance of the workshop. The *Guide* is an extensive compendium of Internet sites and tools for client research that participants can use to do a more effective job of researching their clients.

Learning is supported by immediately applying workshop activities against the Account Plan, so that the resulting plan is continually updated and improved throughout the one-day workshop. The account team leaves the workshop with an *Account Plan Snapshot* that can be distributed to other members of the sales organization. Members of the account team also discuss and de-brief each of the activities in table groups throughout the workshop, thus affording additional opportunities to improve the quality of their plan.

An integral part of the workshop's success is the credibility of the facilitator. Each SAS workshop is delivered by an experienced facilitator with significant business-to-business sales experience and in assisting account teams in developing account plans. The workshop requires facilitators to apply their expertise in each module. Inevitably, numerous issues not covered by the workshop content arise and each facilitator must rely on his or her sales or sales management experience to address those key issues. As a result, the workshop is facilitator dependent and, for that reason, SAS facilitators are carefully selected, trained and certified to ensure their ability to address questions and problems that arise throughout the day.

The overall SAS process is comprised of three distinct components; namely,

- SAS Pre-Workshop activities
- One-Day SAS Account Planning Workshop (Instructor-led)
- SAS Action Plan Execution

Overall Learning Objectives of the Workshop

By the end of the facilitated workshop, participants will have accomplished the following…

- Developed and revised an *Account Plan Snapshot* for one of their strategic accounts
- Identified and verified new revenue growth opportunities – comprised of both known (existing) opportunities and unqualified new opportunities
- Identified influential client executives within the strategic account, who have played key roles in previous major buying decisions
- Built a *Relationship Map* that aligns key client executives with members of the core and extended team (as well as business partners)
- Created a realistic action plan for the next 60-90 days that focuses on the top sales opportunities within the account

Pre-Workshop Assignment

Participants are asked to assemble information about a current strategic account they are pursuing and bring that portfolio of information with them to the workshop. This would include portions of the *Account Plan Snapshot*, work on which will be led by the account team leader. An all-inclusive *SAS Pre-Workshop Guidebook* is distributed, along with the *SAS Software Tool*, to the account team leader to assist in leading and completing that pre-workshop assignment.

SAS Workshop Modules

The workshop is comprised of the following modules:

- Brief Introduction
- Profile Your Account
- Grow Your Revenue
- Assign Key Relationships and Foster Team Collaboration
- Summary and Close

Brief *Introduction* Module

The workshop begins with a reinforcement of why account teams need to have a plan in place to systematically optimize the revenue potential that can be realized from their strategic accounts. The overall workshop objectives are disclosed and the SAS Process is overviewed in a brief, but comprehensive manner.

The teaching methodology for the *Introduction* module is interactive discussion. Participants are organized in table teams at the beginning of the workshop to facilitate robust discussions and participation in a variety of team activities, centered on the further development of a plan for their strategic account.

Profile Your Account Module

This module delivers a comprehensive and insightful methodology to enable the team to quickly expand and develop an accurate profile of the strategic account. It is accompanied by the *SAS Software Tool* that was distributed with the pre-work assignment and participants now receive full access to the tool with a password that is distributed in the workshop.

By the end of this module, participants are able to…

Review account information previously assembled with other team members and gain agreement on:

- The organizational structure of the account
- The most important units within the organization
- Business Pressures and Drivers that affect the organization
- Current relationships (amongst your team and key client executives)

The teaching methodologies used for this module are interactive discussion and activities which support the application of the process to their strategic account. The *SAS Software Tool* is reviewed in this module and used by the account teams for a variety of activities.

Grow Your Revenue **Module**

In this module, account teams expand the process of identifying the key business drivers affecting the client organization, as well as the specific business initiatives the client has (or will) put in place to address those drivers. Teams learn that business drivers can arise from both internal and external sources and can originate from a variety of sources. By understanding these key business issues, the teams learn how to leverage their focus on sales opportunities that have the greatest potential to generate payback within the client organization.

Account teams learn how to define three types of revenue opportunities – specifically, On-Going (which results from contract renewals, upgrades, consumables and the like) as well as Known New (related to projects or initiatives the client already has in place) and Unqualified New (those initiatives you expect or anticipate the client will launch). The account teams then map their sales opportunities against the client initiatives, creating a unique *Opportunity Value Assessment* that examines the value of the opportunity to both the client organization, as well as to your company.

By the end of this module, participants are able to…

- Use a common approach for defining and pursuing three types of revenue; namely, On-Going, Known New and Unqualified New
- Know how to explore and uncover new revenue growth potential in their account
- Prioritize and select the top sales opportunities to pursue
- Build an *Account Snapshot Map* that aligns client initiatives with the related sales opportunities

The teaching methodologies used for this module are interactive discussion and activities which support the application of the process to the strategic accounts of the participants. The *Account Snapshot Map* is introduced in this module as the basis for identifying the client's portfolio of business initiatives and aligning them with your opportunities.

Assign Key Relationships and Foster Team Collaboration **Module**

In this module, account teams review the client Organization Chart they created using the SAS Software Tool in the pre-work assignment and expand that information based on concepts they have just covered in the workshop. They then specifically identify the key players within the client organization who should be assigned coverage by either the core or extended team and update the Organization Chart in the *SAS Software Tool*. This information then automatically populates a *Relationship Map* which becomes an integral part of the account plan.

SAS facilitators provide business and personal examples to illustrate the characteristics, requirements for success and the caveats associated with successfully establishing and aligning these relationships. A tool for developing relationship strategies with individual key players in the client organization is introduced in this module and subsequently used to create specific actions associated with those players.

Account teams also identify the *Influence Network* they perceive to be in effect within the client organization. The *Influence Network* is defined as those key players within the client organization who seem to have a continuous level of influence on major buying decisions made within the organization**.**

The top sales opportunities are then reviewed and specific actions associated with those top opportunities are identified and put in place in an Action Planning activity.

By the end of this module, participants are able to…

- Identify the *Influence Network* for their strategic account
- Align members of the account team (including the extended team) with key players from the client organization
- Validate key business initiatives and high-potential sales opportunities
- Create a 60-90 day Action Plan to exploit those key sales opportunities

The teaching methodologies used for this module are interactive discussion and activities which support the application of the process to a second, brief case study and the individual sales campaigns of the participants. The *SAS Software Tool* is again used for several key activities within this module, including the introduction of the *Influence Map*.

Summary and Close **Module**

In this module, the progress made on the development of specific account plans is summarized. Key concepts delivered during the day are also discussed and reviewed. The importance of updating the account plan and communicating the status of the *Plan* to the core and extended team is stressed.

SAS Optional Day 2 – Validate, Test and Improve the Plan

An optional second day (half-day or full day, at the client's discretion), complete with materials, has been developed to support the SAS workshop.

The specific purpose of the second day of the SAS Workshop is to have the account teams experience a process of validating, testing and improving their account plans. The supporting material contains the process, multiple copies of the corresponding worksheets and targeted pages from the SAS participant workbook.

The structured process of plan improvement involves a number of steps that are managed and directed by the facilitator. Account Plans are presented by the specific account teams and the reviewing teams have a focused objective to help the presenting team improve the overall quality of their plan so that they can optimize the impact of the plan within the client organization.

Improvements to each plan are centered on optimizing the core concepts that were reviewed during the previous day of the SAS workshop. The account team whose plan is being reviewed will be asked to articulate the following components of their plan:

- The *Account Plan Snapshot*
- The Organization Chart for the strategic account, which is an integral component of the *SAS Software Too*
- The *Influence Network,* showing those key players in the client organization who seem to have a continuous level of influence on major buying decisions
- A *Relationship Map*, featuring key client executives who are aligned with members of the core and extended team
- The specific opportunities identified including those that are in each of the three specific categories; namely, On-Going, Known New and Unqualified New
- An overview of the *Action Plan* for the next 60-90 days

Each plan selected for review will undergo a rigorous process that includes validating, testing and improving the plan. Even if an account team's plan was not selected for review, the rigor of each plan improvement process provides substantial benefits for all participants.

Reinforcement Days

Reinforcement Days can also be scheduled to support the testing of *SAS Account Plans* on a scheduled or planned basis.

The specific purpose of the Reinforcement Day is to have participants experience a process of validating, testing and improving the plans of specific strategic accounts. This Reinforcement Day is very similar to the Optional Day 2 of the SAS Workshop, described immediately above. The supporting material for the Reinforcement Day contains the process, multiple copies of the corresponding worksheets and targeted pages from the SAS participant workbook.

In practice, the Reinforcement Day can initially be conducted by a certified SAS facilitator; however, our objective is to transfer the skill for conducting Reinforcement Days to sales managers within the client organization.

Testing – A Level 2 Approach to Evaluation

A Level 2 approach to evaluation is achieved by the use of SAS Pre- and Post-Test instruments that are made available to clients at no charge. Obviously, this process is only implemented when the client's culture supports the use of testing as a way of evaluating the learning that has taken place in a workshop.

In that case, the SAS Pre-Test could be administered on-line in advance of the workshop or at the start of the workshop itself. A similar test, perhaps with the questions re-sequenced, is also administered at the end of first day of the workshop to provide information about the learning that has taken place in the workshop.