



# Account Planning in Salesforce: Unlock Revenue from Big Customers to Turn Them into BIGGER Customers

*Donal Daly*

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ACCOUNT PLANNING in SALESFORCE is focused on helping companies that have purchased Salesforce with their Account Planning initiatives. Its goal is to be the reference text on Account Planning for all Salesforce users.

Account Planning is a tremendously important endeavor. It drives revenue, increases customer satisfaction, aligns your organization, and provides incredibly gratifying moments when you can see the impact of your work – both for the customer, and for your company.

Account Planning is a strategic imperative that goes beyond traditional selling tactics. The benefits that accrue go beyond simple revenue numbers, and point to an approach that must be focused not just on greater revenue as the sole arbiter of strategy. When Account Planning is executed well, customer satisfaction increases. Customers who are more satisfied buy more from you, and do so without calling your competitors first. Customers who are served well are easier to retain, and therefore it is easier to make your revenue targets year after year. When you do effective Account Planning, you get to understand the customer's business, sit with them at their side of the table, and strengthen your ability to shape their thinking and their business strategies. A happy customer is hostile territory for your competitor to enter. Switching suppliers is expensive for a customer and they will do so only if they feel you are not serving them well and fairly. Your ability to monitor, measure and react is greater if you are closer to the heart of their business, understanding their corporate goals, and motivations. It takes investment, research and hard work, but is the price of customer retention and growth.

In ACCOUNT PLANNING in SALESFORCE, you will learn how to gather the information you need to understand the Account as a marketplace and to segment that marketplace into discrete units so that you can choose where to spend your time. Recording the Current Opportunities in the Account, as well as business you already have won, you will be able to place your solutions on a structured map of the customer's business. Exploring how to uncover the customer's Business Drivers and how to navigate the political landscape in the account will help you to understand both the people who matter – the Key Players – and

their associated Business Drivers. When all of the opportunities in the Account have been identified, you will evaluate each one against the twin axes of Value to Customer and Value to Us. That way you will uncover areas of Mutual Value – which is a thread that you will find woven into the fabric of the methodology. It is important. This is the White Space in the Account where you can help your customer to identify new potential areas of opportunity – and simultaneously discover new areas of opportunity for yourself. Finally, you will build the Execution Plan so that you get beyond planning and begin to manage and execute. And to keep things interesting, you will find many musical references throughout the book – this will be the only book on Account Planning that you will find that includes a song playlist!



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