Strategy Mapper- Account Mapper Templates

www.pointntime.com

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This document is intended to provide you and assist you in the planning your Account Mapper templates to be used in Strategy Mapper. Strategy Mapper gives you the ability to highly customize your templates to provide the information and activities to ensure your teams are successful in their accounts. This document also, includes examples for each section to assist you in your planning.

Overview

An Account Mapper template has 4 sections:

- ✓ Account Mapper Template Details
- ✓ Button Configuration
- ✓ Tab Configuration
- ✓ Label Configuration
- ✓ Checklist

Account Mapper Template Details

The Account Mapper Template Details consists of the following sections ***(Figure 1)***:

- ✓ Account Strategy
- ✓ 6 Month Plan
- ✓ 12 Month Plan
- ✓ Lessons Learned
- ✓ Value Proposition

Figure 1

NOTE: Once a user selects a template they can edit any or all of the sections detailed below, to better align with their particular accounts and plans.

NOTE: It is not mandatory that the sections be completed for the users. They are meant to build consistence among account teams and provide guidance on the type of information required in the plan.

Account Strategy

Account Strategy – enter in information for account teams on the overall strategy for accounts of this type ***(Figure 2)***. This can be used to provide guidance on what to include in this section.

Account Strategy	The overall account strategy is to ensure we maintain relationships at the executive and decision maker level. For this account to maintain a strategic account it must do $1m in revenue on a recurring basis. We must ensure we continually discuss any customer initiatives.

Figure 2

6 Month Plan

6 Month Plan – enter in information for account teams for a 6 Month Plan for accounts for this type ***(Figure 3)***. This can be used to provide guidance on what to include in this section.

6 Month Plan

- Determine if Strategy Mapper is meeting/met their goal and objectives.
- Review current state of Strategy Mapper.
- Review 6 and 12 month roadmap.
- Determine any new players.
- Verify buying process.
- Review Initiatives (6 - 12 months)
- Review any existing support tickets and status of tickets

Figure 3

12 Month Plan

12 Month Plan - enter in information for account teams for a 12 Month Plan for accounts for this type ***(Figure 4)***. This can be used to provide guidance on what to include in this section.

12 Month Plan

- Go over renewal
- Review current state of Strategy Mapper.
- Review 12 and 18 month roadmap.
- Determine any new players
- Verify buying process
- Review Initiatives (12 - 24 months)
- Review earnings statements

Figure 4

Lessons Learned

Lessons Learned - enter in lessons learned from account teams ***(Figure 5)***. This can be used to provide guidance on what to include in this section.

Lessons Learned

- Review with account any potential mergers or acquisitions- if so we need to determine if the target companies have any competitive products.
- Continually review any support or helpdesk tickets.
- Review with account the good, bad and ugly of working with us.

Figure 5

Value Proposition

Value Proposition – enter in the value proposition for your products/solutions for this type of account. This should be consistent and reviewed by your marketing department.

Value Proposition

Strategy Mapper is the most cost effective, powerful, configurable, comprehensive and easy to use Strategic Selling solution for Salesforce! Strategy Mapper provides sales leadership unparalleled visibility and access on the progress of Accounts and Opportunities, to ensure revenue goals are met and exceeded.

Strategy Mapper is redefining how sales organizations sell by using robust and accurate information to efficiently drive revenue. Customer meetings are at the heart of the sale cycle but are the least documented in an organization's CRM. Strategy Mapper gathers customer intelligence and turns this information and data into the building blocks or "DNA" of Account Strategy and Opportunity Planning and does it in real-time as each sales cycle progresses.

Figure 6

Button Configuration

Strategy Mapper gives you the ability to display what actions your users can complete. There are 9 buttons that can be displayed in the Account Plan ***(Figure 7)***.

NOTE: Your buttons maybe be arranged in another order then displayed.

Figure 7

- ✓ Account Playbook – Launch Account Playbook
- ✓ Instant Meeting – Start a meeting using Meeting Mapper
- ✓ Org Map – Display the organizational map for the account
- ✓ Back to Account – Back to the details of the account in Salesforce
- ✓ Notify Manager – Send a notification to your manager to review the plan
- ✓ Account Score – Health score of the account based on the plan and information gathered in meetings using Meeting Mapper
- ✓ New Meeting – Start a meeting using Meeting Mapper
- ✓ Save – Save the current plan
- ✓ Notify Team – Send a notification to anyone on your team to review and/or and any comments regarding the strategy for the account

Tab Configuration

Strategy Mapper gives you the ability to display what must be completed or displayed in an account plan. There are 9 buttons that can be displayed in the Account Plan ***(Figure 8)***.

Figure 8

- ✓ Account Team – Who from your team has been in meetings with the customer using Meeting Mapper
- ✓ Child Accounts – Any child accounts of this parent account
- ✓ Customer Buying Process – Allows the user to document the customer buying process
- ✓ Customer Team – Who have you met had meetings with using Meeting Mapper

- ✓ Marketing/Biz Dev – Allows the user to document their marketing or business development plan for the account
- ✓ Notes – Allows the user to add in notes regarding the account, these notes are added to the activity section for the account
- ✓ Red Flags – Allows the user to document any that can derail the success of the account
- ✓ Account Milestones – Allows the user to create activities and assign them to team members
- ✓ Account Timeline – A visual representation of the account from a meeting attendee perspective
- ✓ Cases – If you use Salesforce.com Cases, any cases for the account will be displayed in the plan
- ✓ Charts – Revenue charts for the account based on closed won, lost, pipeline other revenue numbers
- ✓ Competitors – The competitors that have been identified in opportunities
- ✓ Customer Initiatives – Allows the user to document customer initiatives to drive revenue and build pipeline
- ✓ Meeting – View completed meetings linked to the account where Meeting Mapper was used to documents the selling activities
- ✓ Opportunities – View opportunities linked to the account

Labels

Labels allow you to use your terminology and sales methodology ***(Figure 9)***.

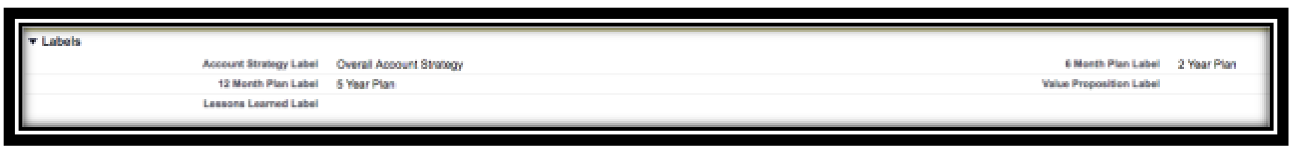

Figure 9

Score Dashboard Configuration

By default, all score dashboards are visible, Account Score Dashboard allow you to determine which ones are visible based on what features you are currently using in Strategy Mapper ***(Figure 10)***.

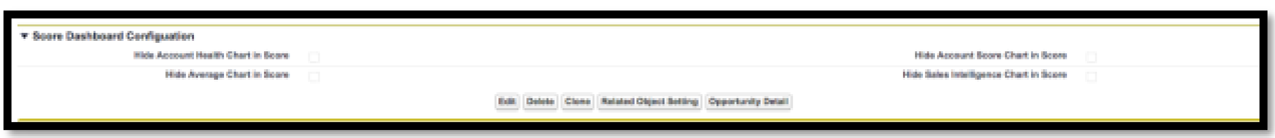

Figure 10

Checklist

Checklist allows you to create a checklist for the account team. A checklist is comprised of the name, coaching (advice for the user) and is it a milestone (significant item that must be completed) ***(Figure 11)***.

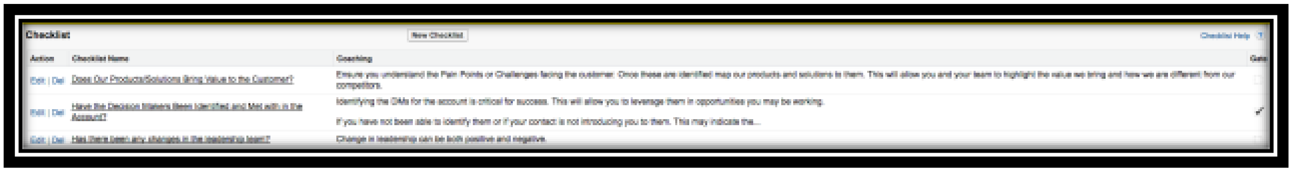

Figure 11

Account Mapper Template Worksheet

This worksheet is design to assist you in planning your Account Mapper templates for your teams. It is recommended you complete the sections then cut and paste into the templates in Salesforce.com.

Best Practice: Point N Time Software recommends you include your sellers when you are creating the templates. Their input is critical to ensure adoption.

NOTE: Each template can have its own configuration.

Template Name

Example – Named Accounts

Account Strategy

Example The overall account strategy is to ensure we maintain relationships at the executive and decision maker level. For this account to maintain a strategic account it must do $1m in revenue on a recurring basis. We must ensure we continually discuss any customer initiatives.

6 Month Plan

Example Determine if Strategy Mapper is meeting/met their goal and objectives. Review current state of Strategy Mapper. Review 6 and 12-month roadmap. Determine any new players. Verify buying process. Review Initiatives (6 - 12 months) Review any existing support tickets and status of tickets

12 Month Plan

Example Go over renewal Review current state of Strategy Mapper. Review 12 and 18-month roadmap. Determine any new players Verify buying process Review Initiatives (12 - 24 months) Review earnings statements

Lessons Learned

Example Review with account any potential mergers or acquisitions- if so we need to determine if the target companies have any competitive products. Continually review any support or helpdesk tickets. Review with account the good, bad and ugly of working with us.

Value Proposition

Example Strategy Mapper is the most cost effective, powerful, configurable, comprehensive and easy to use Strategic Selling solution for Salesforce! Strategy Mapper provides sales leadership unparalleled visibility and access on the progress of Accounts and Opportunities, to ensure revenue goals are met and exceeded. Strategy Mapper is redefining how sales organizations sell by using robust and accurate information to efficiently drive revenue. Customer meetings are at the heart of the sale cycle but are the least documented in an organization's CRM. Strategy Mapper gathers customer intelligence and turns this information and data into the building blocks or "DNA" of Account Strategy and Opportunity Planning and does it in real-time as each sales cycle progresses.

Button Configuration

Review the buttons you want displayed in an Account Mapper template. The buttons in your template maybe in a different order. Check the box next to the button you want to include in your template.

NOTE: By default, all buttons are enabled.

- ☐ Account Playbook
- ☐ Account Action Plan
- ☐ Instant Meeting
- ☐ Org Map
- ☐ Back to Account
- ☐ Notify Manager
- ☐ Account Score
- ☐ New Meeting
- ☐ Save
- ☐ Notify Team

Tab Configuration

NOTE: By default all buttons are enabled.

- ☐ Account Team
- ☐ Child Accounts
- ☐ Customer Buying Process
- ☐ Customer Team
- ☐ Marketing/Biz Dev
- ☐ Notes
- ☐ Red Flags
- ☐ Account Milestones
- ☐ Account Timeline
- ☐ Cases
- ☐ Charts
- ☐ Competitors
- ☐ Customer Initiatives
- ☐ Meeting
- ☐ Opportunities

Labels

Account Strategy
6 Month Plan
12 Month Plan
Value Proposition
Lessons Learned

Score Dashboard Configuration

Hide Account Health Chart in Score

Hide Average Chart in Score
Hide Account Score Chart in Score
Hide Sales Intelligence Chart in Score

Checklist

Enter in the items that must be completed or uncovered in the Account Plan. There is not limit on the number of Checklist items you can have.

Checklist

Example - Does Our Products/Solutions Bring Value to the Customer?

Coaching

Example Ensure you understand the Pain Points or Challenges facing the customer. Once these are identified map our products and solutions to them. This will allow you and your team to highlight the value we bring and how we are different from our competitors.

Gate ☐

Checklist

Example - Have the Decision Makers Been Identified and Met with in the Account?

Coaching

Example Identifying the DMs for the account is critical for success. This will allow you to leverage them in opportunities you may be working. If you have not been able to identify them or if your contact is not introducing, you to them. This may indicate the chances of driving success and revenue is decreased. A tactic to is: Ask the contact to schedule a meeting with their executive team and ours.

Gate ☒

Checklist

Example - Has there been any changes in the leadership team?

Coaching

Change in leadership can be both positive and negative.

Gate ☐