Plan2Win
SALES PLANNING SIMPLIFIED

Account Planning Pro Overview

OVERVIEW

Account Plan Pro for Salesforce.com is an integrated application that enables Account Managers to create and execute Strategic Account Plans to improve sales results.

It is designed to respond to the 7 requirements of an Effective Sales Planning app:

1. Enable creation of strategic plans – shifting from a tactical approach
2. Prioritize accounts and opportunities
3. Execute plans by having them in Salesforce.com
4. Provide visibility for Sales Management and Account Managers via reports and dashboard
5. Straight-forward, easy to use and learn
6. Works with your sales approach
7. Good Value in dollars and training time

DESCRIPTION

Account Plan Pro is used by account managers, sales managers and executives for creating and managing account plans and the associated strategies and execution of tactics for these plans. Typically, the planning process is performed on the critical few, top current accounts and prospects. The plan guides the account manager through all of the activities and pitfalls with managing top accounts. Just as useful for a vertical focus, Account Plan Pro provides the focus needed to penetrate the account and achieve even aggressive sales goals.

KEY FEATURES

Account Plan Pro enables improved Account Management by providing the following features:

- Template for creating a strategic account plan that covers all key topics for effective account management
- Pipeline information updates to show progress vs. sales goals
- Dashboard and Reports enable account managers and sales managers to monitor progress and direct activities to achieve goals Works in both Lightning and Classic user interfaces

FEATURES & BENEFITS

- ✓ **Standardize** the planning process across the entire sales force
- ✓ **The app calculates** sum of closed and open opportunities
- ✓ **Funnel requirement and gap** calculated by app- based on close ratio
- ✓ **Build an account plan;** leveraging SWOT analysis
- ✓ **Easily bring opportunities** into the account plan via Select Opportunity function
- ✓ **Create a target opportunity list** and a plan to win each one
- ✓ **Generate tasks and events for each strategy**
- ✓ **Build a task list** based on the overall account view.
- ✓ **Create strategies for building strategic relationships**
- ✓ **Generate partner strategies** to win in the account
- ✓ **Route** the plan to the manager for review, approval
- ✓ **Generate a PDF of the plan**
- ✓ **Reports and dashboards** to track and guide progress
- ✓ **Access plans** via a web browser or Salesforce 1 Mobile
- ✓ **User Interfaces:** both Classic and Lightning user interfaces

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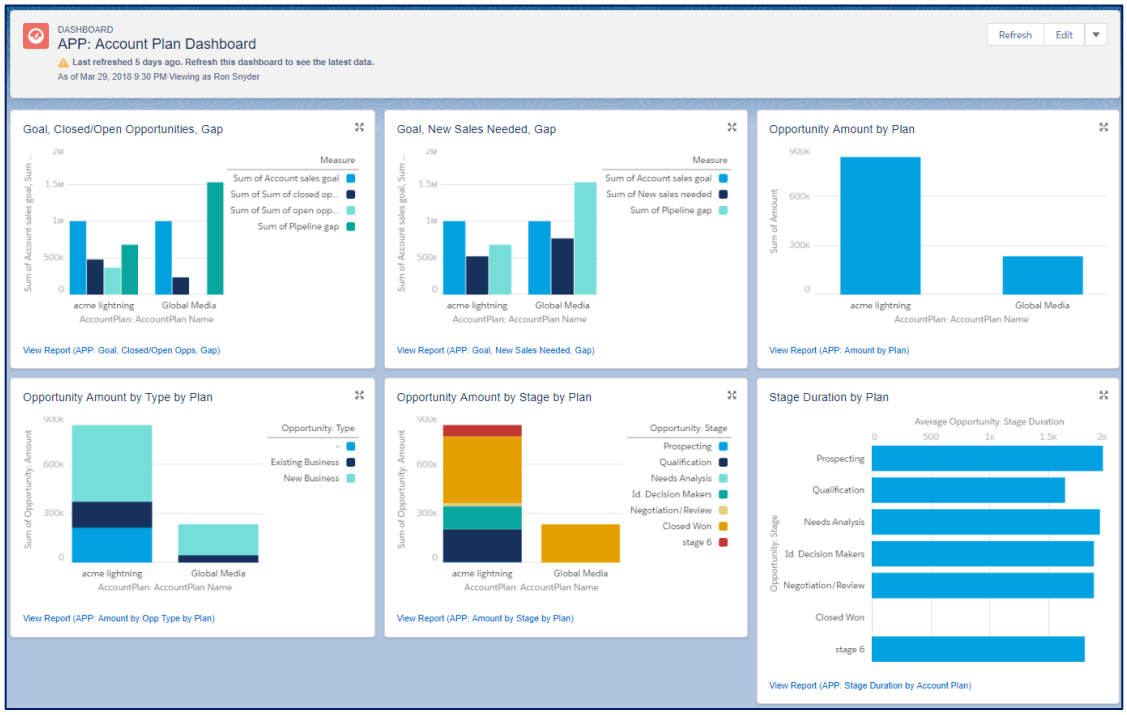
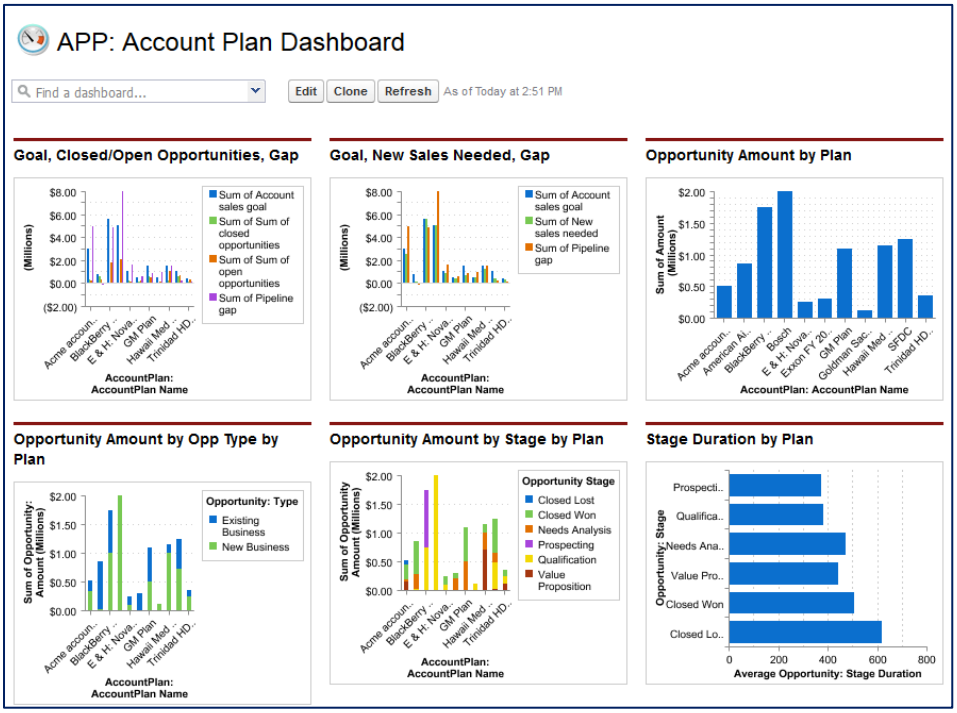
Account Planning Pro Overview

Dashboard for effective Account Management.

LIGHTNING UI DASHBOARD



CLASSIC UI DASHBOARD



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Reports provide insight for plan implementation and management.

LIGHTNING UI REPORTS

Reports
All Folders > Account Plan Reports
16 Items • Sorted by Report Name

New Report

REPORTS
Recent
Created by Me
Private Reports
Public Reports
All Reports
FOLDERS
Created by Me
Shared with Me
All Folders
FAVORITES
All Favorites

REPORT NAME	DESCRIPTION	FOLDER	LAST MODIFIED BY	SUBSCRIBED
APP: Account Plan Summary By Date		Account Plan Reports	Ron Snyder	
APP: Acct Plan Summary Report		Account Plan Reports	Ron Snyder	
App: Activities, Strategies by Plan		Account Plan Reports	Ron Snyder	
APP: Amount by Opp Type by Plan		Account Plan Reports	Ron Snyder	
APP: Amount by Plan		Account Plan Reports	Ron Snyder	
APP: Amount by Stage by Acct		Account Plan Reports	Ron Snyder	
APP: Amount by Stage by Plan		Account Plan Reports	Ron Snyder	
APP: Goal, Closed/Open Opps, Gap		Account Plan Reports	Ron Snyder	
APP: Goal, New Sales Needed, Gap		Account Plan Reports	Ron Snyder	
APP: Opp Detail by Plan		Account Plan Reports	Ron Snyder	
APP: Stage Duration by Account Plan		Account Plan Reports	Ron Snyder	
APP: Stage Duration History by Stage		Account Plan Reports	Ron Snyder	
APP: Team Deliverables requires Con...		Account Plan Reports	Ron Snyder	
APP: Team Deliverables; Contact opti...		Account Plan Reports	Ron Snyder	
APP: Top Opportunities by Acct Plan		Account Plan Reports	Ron Snyder	
APP: Usage Report		Account Plan Reports	Ron Snyder	

CLASSIC UI REPORTS

Reports & Dashboards
New Report... New Dashboard...
Guided Tour

Folders
Find a folder...
All Folders
Unfiled Public Reports
My Personal Custom Reports
My Personal Dashboards
Account Plan Dashbds (Installed Package
Account Plan Reports (Installed Package:
Company Dashboards
Google AdWords Dashboards (Installed P
Google AdWords Reports (Installed Packa
Territory Plan Dashbds (Installed Package
Territory Plan Reports (Installed Package:
Account and Contact Reports
Opportunity Reports
Sales Reports
Lead Reports
Support Reports
Campaign Reports
Self-Service Reports
Administrative Reports
Activity Reports
Product and Asset Reports
Call Center Reports
File and Content Reports

Account Plan Reports (Installed Package: Account Plan Pro)
Find reports and dashboards...
All Items
All Types

Action	Name	Folder	Created By
	APP: Account Plan Summary By Date	Account Plan R...	Snyder, Ron
	APP: Acct Plan Summary Report	Account Plan R...	Snyder, Ron
	App: Activities, Strategies by Plan	Account Plan R...	Snyder, Ron
	APP: Amount by Opp Type by Plan	Account Plan R...	Snyder, Ron
	APP: Amount by Plan	Account Plan R...	Snyder, Ron
	APP: Amount by Stage by Acct	Account Plan R...	Snyder, Ron
	APP: Amount by Stage by Plan	Account Plan R...	Snyder, Ron
	APP: Goal, Closed/Open Opps, Gap	Account Plan R...	Snyder, Ron
	APP: Goal, New Sales Needed, Gap	Account Plan R...	Snyder, Ron
	APP: Opp Detail by Plan	Account Plan R...	Snyder, Ron
	APP: Stage Duration by Account Plan	Account Plan R...	Snyder, Ron
	APP: Stage Duration History by Stage	Account Plan R...	Snyder, Ron
	APP: Team Deliverables; Contact optional	Account Plan R...	Snyder, Ron
	APP: Team Member Deliverables	Account Plan R...	Snyder, Ron
	APP: Top Opportunities by Acct Plan	Account Plan R...	Snyder, Ron
	APP: Usage Report	Account Plan R...	Snyder, Ron

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Previous Next

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LIGHTNING UI ACCOUNT PLAN SCREEN

DETAILS

Bring in Opportunities, Contacts, Generate PDF

Hawaii Med Center Plan | + Follow | Edit | Select from My Opportunities | Bring In Contacts | Generate PDF | Bring In Account Opportunities

Related List Quick Links

- Strength, Weakness, Opportunity, Threat (4)
- Strategies (3)
- AccountPlan Opportunities (4)
- AccountPlan Relationships (5)
- AccountPlan Team Members (2)
- AccountPlan Partners (1)

Plan Information

AccountPlan Name
Hawaii Med Center Plan

Account
Hawaii Med Ctr

Close ratio
50%

Account sales goal
$1,500,000

Sum of closed opportunities
$350,000

Additional sales from existing base
$0

New sales needed
$1,150,000.00

Pipeline needed
$2,300,000

Sum of open opportunities
$350,000

Pipeline gap
$1,950,000

App calculates Sales Needed, Pipeline Gap

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

Account History, Trends

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

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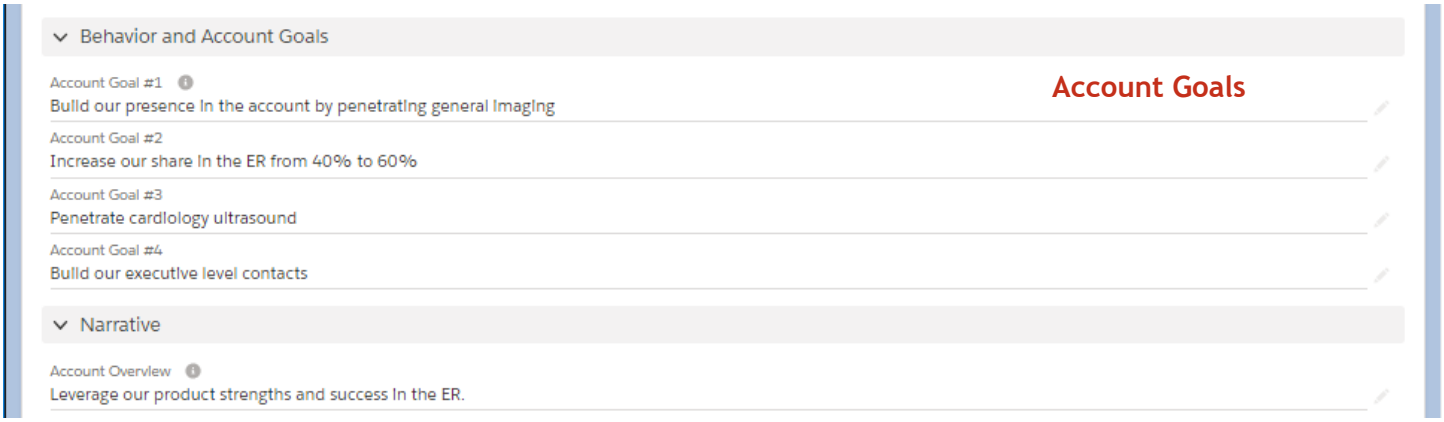
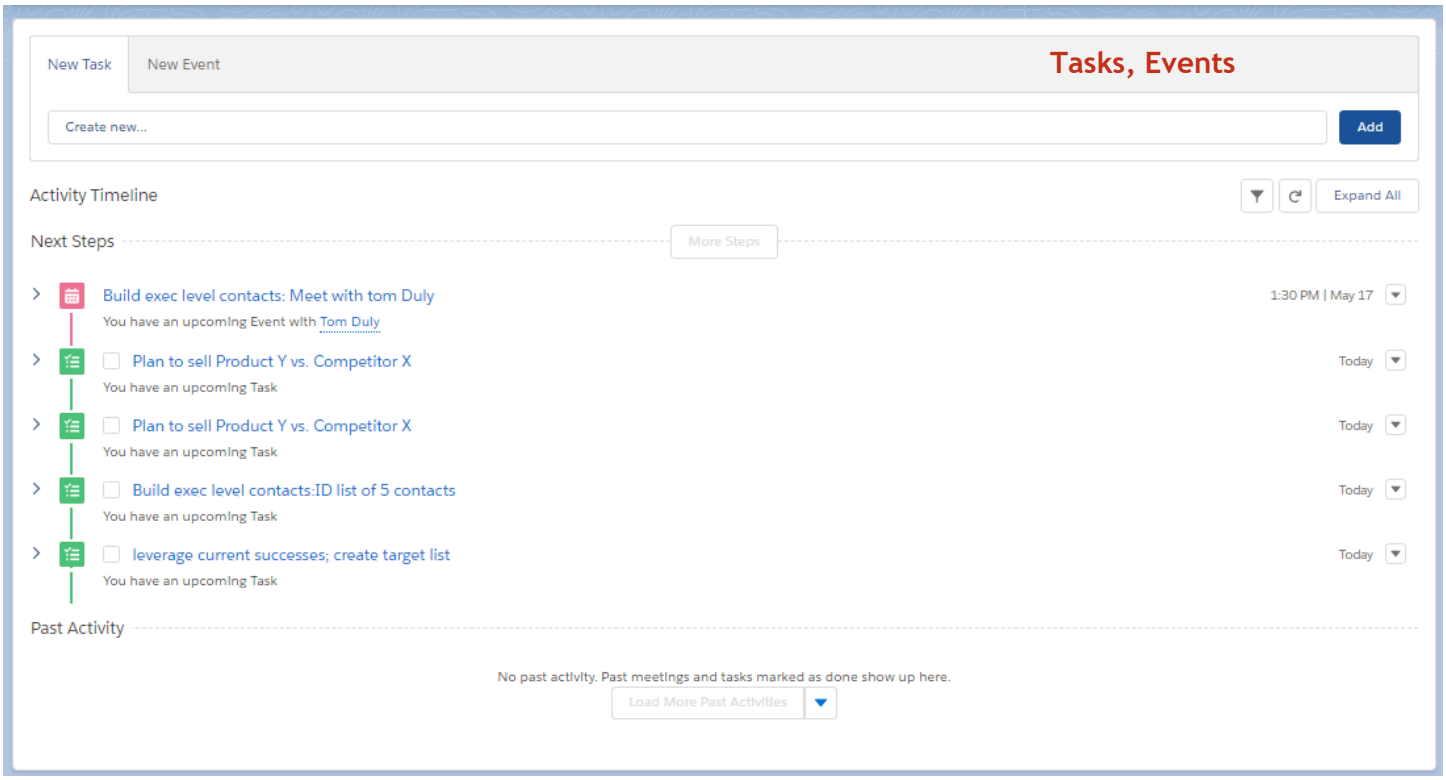
LIGHTNING UI ACCOUNT PLAN SCREEN (CONTINUED)





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LIGHTNING UI ACCOUNT PLAN SCREEN (CONTINUED)

SWOT Analysis

Strength, Weakness, Opportunity, Threat (4) — New

TYPE	SWOT DESCRIPTION
Strength	product capabilities, flexibility and value
Weakness	limited number of luminary references
Opportunity	leverage our unique capabilities
Threat	competition coming out with strong product and aggressive pricing

View All

Strategies and Tactics

Strategies (4) — New

STRATEGY	TACTIC
Beat competitor X	Sell Product Y
Build exec level contacts	ID list of 5 contacts
Build exec level contacts	Meet with CIO
Leverage current successes	Work with current customers

View All

Opportunities

AccountPlan Opportunities (4) — New

OPPORTUNITY NAME	ACCOUNT NAME	STAGE	AMOUNT
Hawaii Med Ctr GI	Hawaii Med Ctr	Closed Won	$200,000.00
Hawaii Med Ctr network	Hawaii Med Ctr	Value Proposition	$100,000.00
Hawaii Med Ctr Cardiology	Hawaii Med Ctr	Qualification	$250,000.00
Ultrasound: ER	Hawaii Med Ctr	Closed Won	$150,000.00

View All

Account Relationships

AccountPlan Relationships (5) — New

FIRST NAME	LAST NAME	TITLE	BUYING ROLE
Eric	Newman	Radiologist	Technical Evaluator
Tom	Duly	CIO	Financial Evaluator
Joe	Gotto	VP Imaging	Technical Evaluator
Jim	Garrison	CEO	Decision Maker
Betty	Finestein	Chief Radiology	Technical Evaluator

View All

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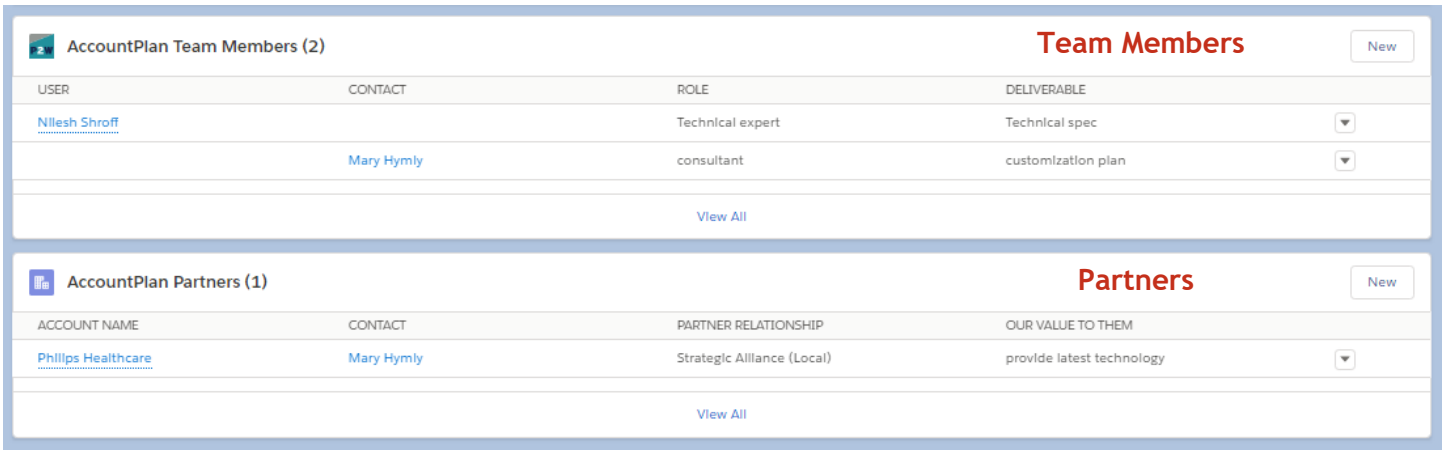
LIGHTNING UI ACCOUNT PLAN SCREEN (CONTINUED)



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CLASSIC UI ACCOUNT PLAN SCREEN: ACCOUNT INFORMATION

AccountPlan
Hawaii Med Center Plan

Bring in Opportunities, Contacts, Generate PDF.

Customize Page | Printable View | H

Show Feed

Strength, Weakness, Opportunity, Threat [4] | Strategies [5] | Open Activities [4] | AccountPlan Opportunities [3] | AccountPlan Relationships [4] | AccountPlan Te
AccountPlan Partners [1] | Activity History [5+] | Approval History [0]

AccountPlan Detail

Edit | Delete | Clone | Generate PDF | Select from All Opportunities | Select from My Opportunities | Bring in Account Opportunities | Bring in Contacts

Plan Information

AccountPlan Name	Hawaii Med Center Plan	Account sales goal	$1,500,000
Account	Hawaii Med Center	Sum of closed opportunities	$150,000
Close ratio	50%	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

App calculates Sales Needed, Pipeline Gap

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

Capture Account History, Trends.

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

Behavior and Account Goals

Identify 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

Narrative

Account Overview	Leverage our product strengths and success in the ER

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CLASSIC UI ACCOUNT PLAN SCREEN: SWOT, STRATEGY

Strength, Weakness, Opportunity, Threat New SWOT

Action	Type	SWOT Description
Edit | Del	Strength	product capabilities, flexibility and value
Edit | Del	Weakness	limited number of luminary references
Edit | Del	Opportunity	leverage our unique capabilities
Edit | Del	Threat	competition coming out with strong product and aggressive pricing

Conduct SWOT Analysis.

Strategies New Strategy

Action	Strategy	Tactic
Edit | Del	Build exec level contacts	ID list of 5 contacts
Edit | Del	increase % of spend	ID 5 new Opportunities
Edit | Del	leverage current successes	work with current customer
Edit | Del	sell new product	ID candidates

Generate Strategies and Tactics.

Open Activities New Task New Event

Action	Subject	Name	Task	Due Date	Status	Priority	Assigned To
Edit | Cls	sell new product:ID candidates		✓	10/22/2015	Not Started	Normal	Ron Snyder
Edit | Cls	leverage current successes: create target list		✓	1/22/2016	Not Started	Normal	Ron Snyder
Edit | Del	Build exec level contacts: meet w Jim Garrison	Jim Garrison		1/26/2016 4:00 PM			Ron Snyder
Edit | Cls	increase % of spend: ID 5 new Opportunities		✓	2/5/2016	Not Started	Normal	Ron Snyder

From Strategies, generate Tasks & Events; connecting strategies to action.

CLASSIC UI ACCOUNT PLAN SCREEN: OPPORTUNITIES, RELATIONSHIPS, TEAM, PARTNERS, ACTIVITIES

AccountPlan Opportunities New AccountPlan Opportunity

Action	Opportunity Name	Account Name	Type	Amount	Stage	Probability (%)	Close Date
Edit | Del	Ultrasound: ER	Hawaii Med Center	Existing Business	$150,000.00	Closed Won	100	1/8/2016
Edit | Del	Hawaii Med Ctr Network	Hawaii Med Center	Existing Business	$800,000.00	Proposal/Price Quote	75	2/5/2016
Edit | Del	Ultrasound: GI	Hawaii Med Center	New Business	$700,000.00	Value Proposition	50	2/26/2016
Edit | Del	Ultrasound: Cardiology	Hawaii Med Center	New Business	$300,000.00	Needs Analysis	20	3/25/2016

Prioritize and include Opportunities

AccountPlan Relationships New AccountPlan Relationship

Action	First Name	Last Name	Title	Buying Role	Support	Reports to	Our Unique Value to them	Relationship Strategy
Edit | Del	Eric	Newman	Radiologist	Technical Evaluator	Positive	Betty Finestein	Likes new technology	Show him we have the best, latest technology
Edit | Del	Josie	Wester	Rad Dept Mgr	User	Positive	Joe Getto	concerned re change that will create inefficiencies	show how smoothly other departments run with our equipment
Edit | Del	Tom	Duly	CIO	Advisor/Coach	Neutral		Big ego	Make it look like he brought in great technology
Edit | Del	John	Splatt	CFO	Decision maker	Neutral	Jim Garrison	focused on bottom line	show ROI

Relationships, Roles, Support, Strategies

AccountPlan Team Members New AccountPlan Team Member

Action	User	Contact	Role	Deliverable	Due date
Edit | Del	Nilesh Shroff		technology expert	tech spec	1/22/2016
Edit | Del	Reuven Shelef	Betty Finestein	sponsor	meet with execs	1/29/2016

Team Member Roles, Deliverables, Due Dates

AccountPlan Partners New AccountPlan Partner

Action	Account Name	Contact	Partner relationship	Our Value to Them	Their Value to Us	Partner strategy
Edit | Del	Philips Healthcare	George Remo	Strategic Alliance (Local)	great products	provide services our customer needs	work together to grow account business

Partner Strategies

Activity History Log a Call Mail Merge Send an Email View All

Action	Subject	Name	Task	Due Date	Assigned To	Last Modified Date/Time
Edit | Del	sell new service: meet with Alice	Alice Harmony		10/23/2015 8:21 AM	Ron Snyder	10/22/2015 8:22 AM
Edit | Del	penetrate new BU	Bill Martini		7/30/2015 8:18 PM	Ron Snyder	7/29/2015 8:19 PM

Activity History

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CLASSIC UI OPPORTUNITY STRATEGY

Generate Opportunity Strategy for each Opportunity

AccountPlan Opportunity Save Cancel

Basic Information

AccountPlan: Hawaii Med Center Plan
Opportunity: Ultrasound: Cardiology

Opportunity Strategy

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

Our product / service: Ultrasound Cardiology product

Account's decision criteria:
Image Quality
Price
Service

Our differentiations: 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

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SELECT OPPORTUNITIES SCREEN

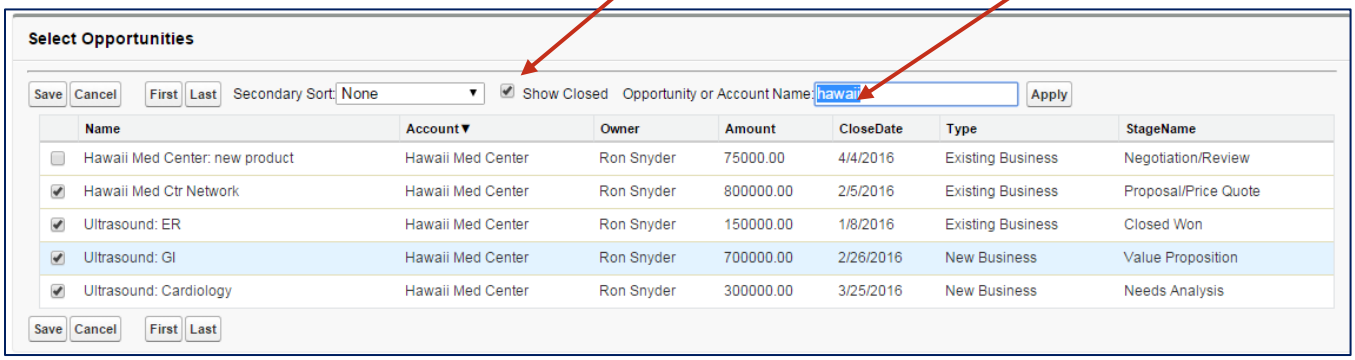
SELECT OPPORTUNITIES:

1. Check the box on the left of the opportunities you want to include in the plan.
2. Click on the column header (Name, Account, etc.) to sort the table by that parameter.
3. You can do a secondary sort by selecting the secondary sort and then apply.
4. Click "Show Closed" to show closed opportunities. Otherwise only open opportunities are shown.
5. In the Opportunity or Account Name field, enter characters and the search will return opportunities with those characters in the Opportunity or Account Name.

Select Opportunities to include in plan.

Can show closed opportunities or only open opportunities.

Can show opportunities based on a string of characters.

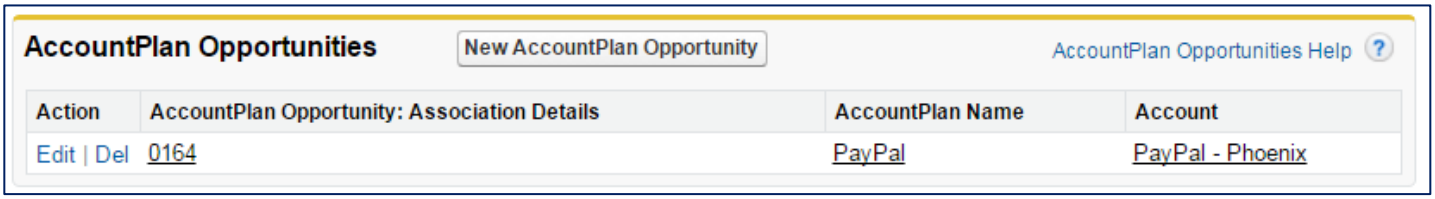


ADD OPPORTUNITIES INTO ACCOUNT PLANS FROM THE OPPORTUNITY PAGE

Your Salesforce.com Admin can add the following sections to your Account and Opportunity pages. See our Set Up Guide.

Add Opportunities into Account Plans from the Opportunity Page

The Opportunity page will now have this section in it. Users can add the opportunity into the Account Plan from the Opportunity page using this section.



Insert Opportunity into Account Plan from Opportunity page

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CLASSIC UI ACCOUNT RELATIONSHIP SCREEN

AccountPlan Relationship Save Cancel

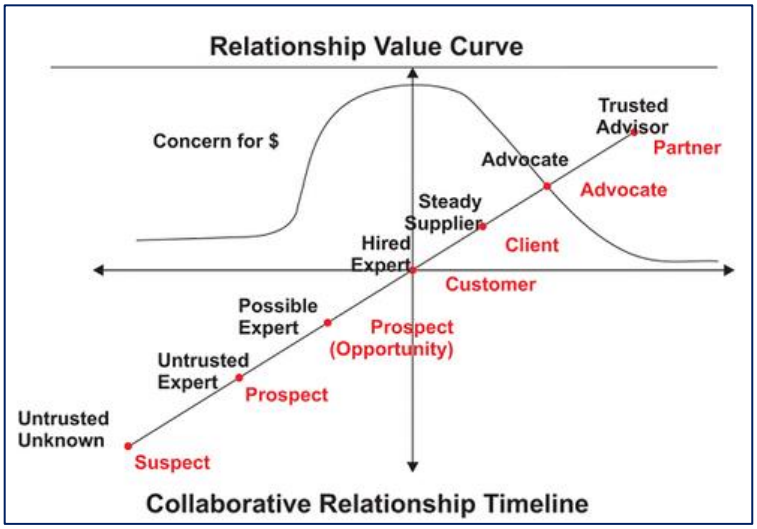
Basic Information

AccountPlan	Hawaii Med Center Plan
Contact	Eric Newman
Buying Role	Technical Evaluator
Support	Positive
Reports to	Betty Finestein

Relationship Strategy

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
Their Relationship View	Possible Expert

Generate a plan for Each Key Relationship



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CLASSIC UI REPORT: STRATEGY – ACTIVITY STATUS

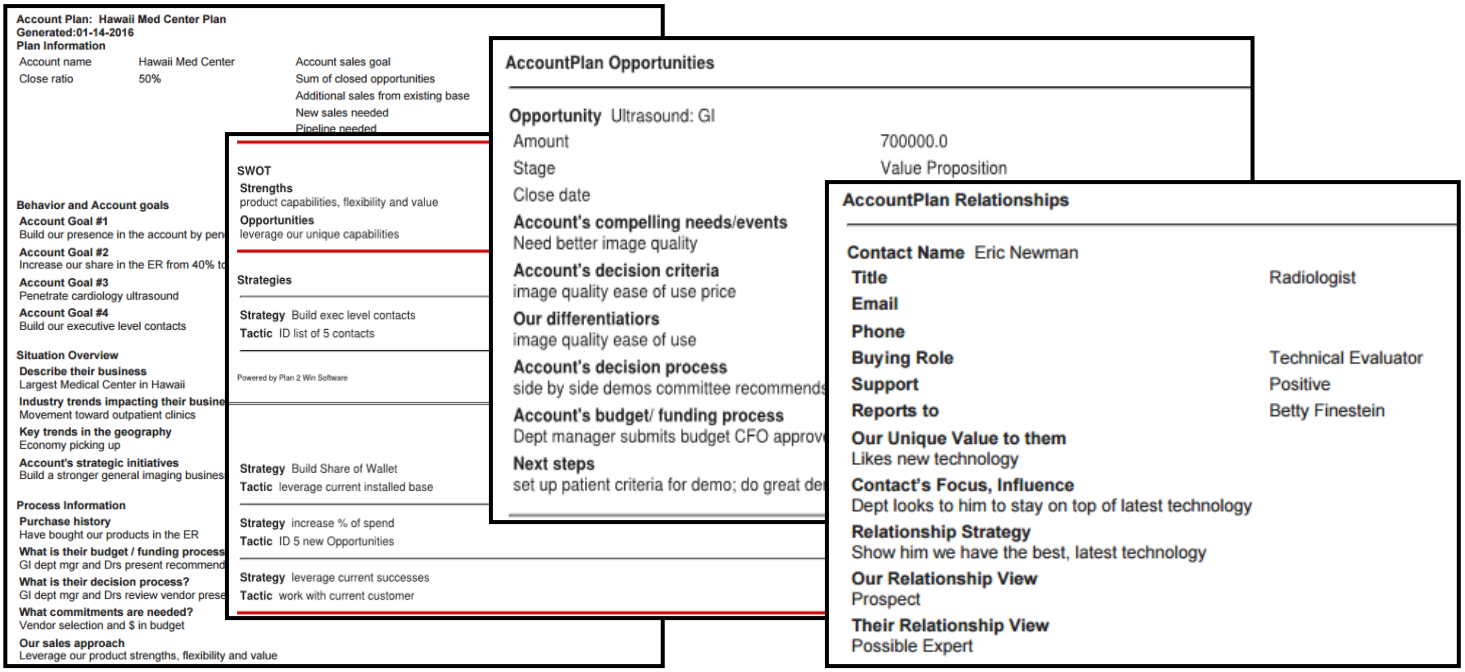
Report tracks Strategy to Actions

ACTIVITY **STRATEGY & TACTIC**

Subject	Comments	Priority	Status	Date
AccountPlan: AccountPlan Name: GM Plan (2 records)				
sell new product: ID candidates to talk to	Strategy:sell new product Tactic:ID candidates to talk to	Normal	Not Started	1/15/2016
sell new BU: ID candidates	Strategy:sell new BU Tactic:ID candidates	Normal	Not Started	1/29/2016
AccountPlan: AccountPlan Name: Hawaii Med Center Plan (2 records)				
leverage current successes: create target list	Strategy:leverage current successes Tactic:create target list	Normal	Not Started	1/22/2016
increase % of spend: ID 5 new Opportunities	Strategy:increase % of spend Tactic:ID 5 new Opportunities	Normal	Not Started	2/5/2016
Grand Totals (4 records)				

PDF OF GOALS, NUMBERS, OVERVIEW

PDF provides time-stamped record of plan



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SALES PLANNING SIMPLIFIED

Account Planning Pro Overview

SPECIFICATIONS

Publisher	Plan 2 Win Software
Type	Native Salesforce.com CRM application Works in both Lightning and Classic user interfaces Salesforce 1 Mobile ready
Salesforce.com AppExchange Partner	Yes
Pricing	$170/year per user Ask about quantity discounts

- 30 Day Site License, Free Trial by clicking "Get it now!"
- Discounts available for purchases of 35 licenses and more… including Territory Plan Pro
- Includes user training for teams of 5 and more

REQUIREMENTS

Salesforce.com Edition	Professional Enterprise Unlimited

Contact us to use our Account Planning app for Group edition

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info@Plan2WinSoftware.com

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