



# Account Plan Pro Fall 2011 Release

*Get the most out of the potential in your Strategic Accounts!*



**Finalist**





# Account Plan Pro

## Goals, Numbers, Plan Overview

**AccountPlan Detail**      [Edit](#)   [Delete](#)   [Clone](#)   [Generate PDF](#)   [Associate Opportunities](#)   [Associate Contacts](#)

---

**▼ Plan Information**

<b>AccountPlan Name</b>	St Judes Hosp 2011	<b>Account sales goal</b>	\$1,500,000
<b>Account</b>	St Judes Hospital	<b>Sum of closed opportunities</b>	\$150,000
<b>Close ratio</b>	50%	<b>New sales needed</b>	\$1,350,000.00
		<b>Pipeline needed</b>	\$2,700,000
		<b>Sum of open opportunities</b>	\$1,000,000
		<b>Pipeline gap</b>	\$1,700,000

---

**▼ Situation Overview**

**Describe their business**    Large metropolitan hospital

**Industry trends impacting their business**    movement toward outpatient clinics

**Key trends in the geography**    economy very slow

**Account's strategic initiatives**    Build a stronger GI 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 present recommendation to capital equip purchase committee; approved by CFO

**What commitments are needed?**    vendor selection or exact \$

**Our sales approach**    Leverage our product strengths, flexibility and value



# Account Plan Pro

## SWOT, Strategies, Activities

**Strength, Weakness, Opportunity, Threat** New SWOT

Action	Type	SWOT Description
<a href="#">Edit</a>   <a href="#">Del</a>	Strength	product capabilities, flexibility and value
<a href="#">Edit</a>   <a href="#">Del</a>	Weakness	limited number of luminary references
<a href="#">Edit</a>   <a href="#">Del</a>	Opportunity	Leverage our unique capabilities
<a href="#">Edit</a>   <a href="#">Del</a>	Threat	competition coming out with strong product and aggressive pricing

**Strategies** New Strategy

Action	Name	Tactic
<a href="#">Edit</a>   <a href="#">Del</a>	<u>Leverage product strengths</u>	Leverage our product strengths, flexibility and value
<a href="#">Edit</a>   <a href="#">Del</a>	<u>Leverage local wins</u>	Leverage our wins in two other hospitals in the area

**Open Activities** New Task New Event

Action	Subject	Name	Task	Due Date	Status	Priority	Assigned To
<a href="#">Edit</a>   <a href="#">Cls</a>	<u>leverage wins: create case study</u>	<u>Aaron Feigin</u>	✓	9/2/2011	Not Started	Normal	<u>Ron Snyder</u>



# Account Plan Pro

## Opportunities, Relationships, Approval

**AccountPlan Opportunities** [New AccountPlan Opportunity](#)

Action	Opportunity Name	Type	Stage	Amount	Probability (%)	Close Date
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Ultrasound: GI</a>	Existing Customer - Upgrade	Value Proposition	\$700,000.00	50	9/30/2011
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Ultrasound: Cardiology</a>	New Customer	Proposal/Price Quote	\$300,000.00	75	9/29/2011
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Ultrasound: ER</a>	New Customer	Closed Won	\$150,000.00	100	8/8/2011

**AccountPlan Relationships** [New AccountPlan Relationship](#)

Action	First Name	Last Name	Title	Buying Role	Contact's focus, influence	Relationship strategy
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">John</a>	<a href="#">Splatt</a>	CFO	Decision maker	decides based on technical facts	Wow him with our technical superiority
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Tom</a>	<a href="#">Goodguy</a>	CIO	Consultant	Look smart	Make it look like he brought in our great technology

**AccountPlan Team Members** [New AccountPlan Team Member](#)

Action	User	Role
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">nilesh_shroff</a>	tech support

**AccountPlan Partners** [New AccountPlan Partner](#)

Action	Account Name	Partner relationship	Partner strategy
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Philips Healthcare</a>	Solutions Partner	Jointly develop and implement plan to win.

**Activity History** [Log A Call](#) [Mail Merge](#) [Send An Email](#) [View All](#)

Action	Subject	Name	Task	Due Date	Assigned To	Last Modified Date/Time
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">meet</a>	<a href="#">John Splatt</a>	<input type="checkbox"/>	8/29/2011 8:00 PM	<a href="#">Ron Snyder</a>	8/30/2011 2:03 PM

**Approval History** [Submit for Approval](#)

No records to display



# Account Plan Pro Opportunity Strategy

Opportunity Strategy	
Account's compelling needs/events	Need to do new procedures
Account's decision criteria	Image quality Price Service
Our differentiators	Image quality Superior technology
Account's decision process ?	Demo top 3 products Meet to select and recommend product Committee approval
Account's budget/funding process ?	Dept Manager submits proposal Committee approves
Our sales approach ?	Leverage our product strengths and Dr X's support



# Account Plan Pro

## Account Relationship Strategy

**AccountPlan Relationship**

Basic Information

Account Plan St. Junes Hosp 2011

Contact John Splatt

Buying Role  Decision maker

Notes  Very technical

Relationship Information

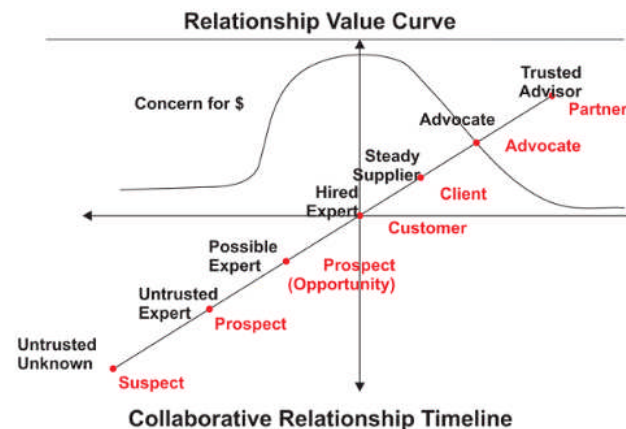
Our Relationship View  Prospect

Their Relationship View  Possible Expert

Contact's focus, influence  decides based on technical facts

Relationship strategy  Wow him with our technical superiority

On the Curve, the Black labels are how our customers see us and the Red is how we see them.





# Account Plan Pro

## PDF: Goals, Numbers, Overview

**Account Plan: St Judes Hosp 2011**

**Generated:10-11-2011**

### Plan Information

Account name	St Judes Hospital	Account sales goal	\$1,500,000
Close ratio	50%	Sum of closed opportunities	\$150,000
		New sales needed	\$1,350,000.00
		Pipeline needed	\$2,700,000
		Sum of open opportunities	\$1,000,000
		Pipeline gap	\$1,700,000

### Situation Overview

#### Describe their business

Large metropolitan hospital

#### Industry trends impacting their business

movement toward outpatient clinics

#### Key trends in the geography

economy very slow

#### Account's strategic initiatives

Build a stronger GI 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 present recommendation to capital equip purchase committee; approved by CFO

#### What commitments are needed?

vendor selection or exact \$

#### Our sales approach

Leverage our product strengths, flexibility and value

### Narrative - Account Overview

Leverage our product strengths and success in the ER



# Account Plan Pro

## PDF: SWOT, Strategies

---

### 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** Leverage local wins

**Tactic** Leverage our wins in two other hospitals in the area

---

**Strategy** Leverage product strengths

**Tactic** Leverage our product strengths, flexibility and value

---



# Account Plan Pro

## PDF: Opportunity Strategy

---

**Opportunity** Ultrasound: Cardiology

Amount 300000.0

Stage Proposal/Price Quote

Close date Sep 29 2011

**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

**Account's budget/ funding process**

Dept Manager submits proposal Funding Committee approves

**Our sales approach**

Leverage our product strength and success in the ER

---



# Account Plan Pro

## PDF: Account Contacts, Partners

### AccountPlan Relationships

---

**Contact Name** John Splatt

**Title** CFO

**Email**

**Phone**

**Buying Role** Decision maker

**Our Relationship View**

Prospect

**Their Relationship View**

Possible Expert

**Contact's focus, influence**

decides based on technical facts

**Relationship strategy**

Wow him with our technical superiority

---

### Account Partners

---

**Partner** Philips Healthcare

**Contact name**

Bill Delorean

**Partner relationship**

Solutions Partner

**Partner strategy**

Jointly develop and implement plan to win.

---



# Account Plan Pro

## PDF: Tasks, Meetings

---

### Tasks

---

<b>Name</b>	Aaron Feigin
<b>Subject</b>	leverage wins: create case study
<b>Priority</b>	Normal
<b>Status</b>	Not Started
<b>Due date</b>	09-02-2011 00:00:00

---

### Events

---

<b>Name</b>	John Splatt
<b>Subject</b>	meet
<b>Location</b>	his office
<b>Start date</b>	08-30-2011 03:00:00
<b>End date</b>	08-30-2011 04:00:00
<b>Description</b>	show our technology