Account Plan Management

Overview

In this section, you will find information about how to create and manage Account Plans in Salesforce, in particular:

- Objectives of the module
- Confidentiality settings
- How to create an Account Plan
- How to associate an Account to an Account Plan
- How to add a colleague to an Account Plan
- How to create a milestone for an Account Plan

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Link with Commercial Excellence

In practice, the Account Development Plan functionality can be used in different ways depending on the GBU needs. For example, you may use it to manage Key Accounts or to manage customer accounts that you intend to grow as Key Accounts for your GBU or for Solvay.

ILLUSTRATION OF KEY ACCOUNT MANAGEMENT (LINK WITH COMMERCIAL EXCELLENCE)

Key Account methodology is dedicated to Accounts with growth potential, including product development & innovation, for which a dedicated Strategic Plan (KAP), aligned with the customer/market Roadmap, is required for the development of customer focused value propositions. It aims at developing pro-actively solutions for customers that lead to partnership beyond transactions from the desire to understand the customers' business, their opportunities and challenges, their customers and marketing stakes.

Key Account Managers (KAM) are responsible for developing strategic relationships with their KA, defining & implementing a Key Account Plan (KAP), committing in mid-term business plan derived from the KAP to achieve annual target with regards to sales, volume & contribution margin, etc.

--> Salesforce can support Key Account Managers in these objectives.

Concerned profiles:

ALL

Step By Step

Definition & Objectives

Account Plan process covers the creation and management of Account Plans in Salesforce, mainly for key accounts, but also applicable for standard accounts. An Account Plan **summarizes the strategy set up for specific accounts or groups of accounts**. Each Account Plan includes milestones detailing the actions to execute in order to achieve the plan.

Once the account plan is created and approved, the execution of the strategy and follow-up of milestones is entirely managed in SFDC. The Account Plan is regularly updated to remain a living document.

The following information can be found in the Account Plan page:

1.Information: this section includes the general information like the owner, the Account Plan Name, the visibility, the GBU, etc.
2.Account Plan Session Stage: This section displays the Account Plan Stage and the validity date
3.(Key) Account Profile: this section define the main market, main challenges and locations
4.Partnership with Solvay: this section displays some financial information
5.Solvay's Project Objective with KA: this section lists the strategy and the 3 key initiatives
6.Business Plan: this table covers the sales, contribution margin and share of wallet projection for next 5 years.

Solution rules

Confidentiality

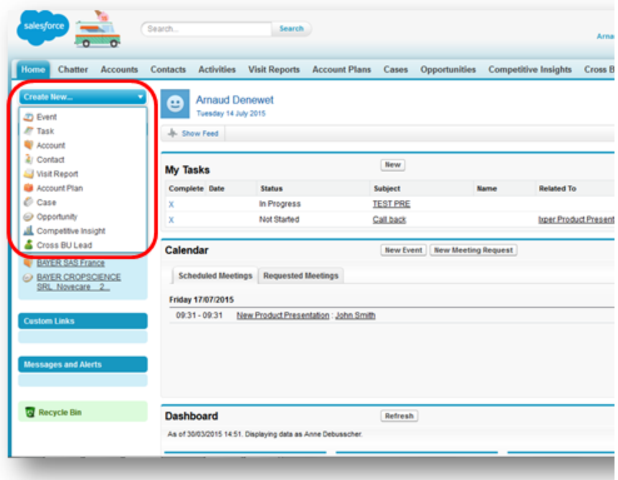
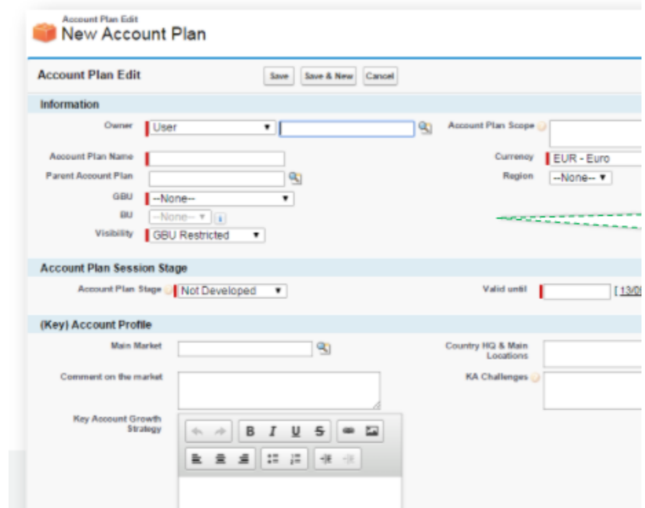
An account plan can have different levels of confidentiality:

•**GBU Restricted**: Your Account Plan will be restricted to your GBU CRM users

•**Account Plan Team** : Your Account Plan is limited to the users identified in the “Account Plan Team”

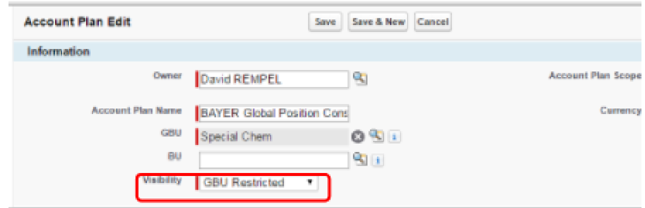
Demo

Create an Account Plan

1 To create his Account Plan, David starts from the home page and *clicks* on **Create New** and then on **Account Plan**	
2 He now can start *filling* the **information** in the different fields.	

3 He now can start *filling* the **information** in the different fields.
A field **Visibility** is available to define who can view the Account Plan. 3 options are foreseen:
•“**Shared**”: it means the Account Plan is visible by all the users in Salesforce
•“**GBU restricted**”: it means only the users in the field GBU are able to see the Account Plan
•“**Account Plan Team**”: only the colleagues added in the “Account Plan Team” will be able to view the Account Plan

•David will let the Account Plan shared



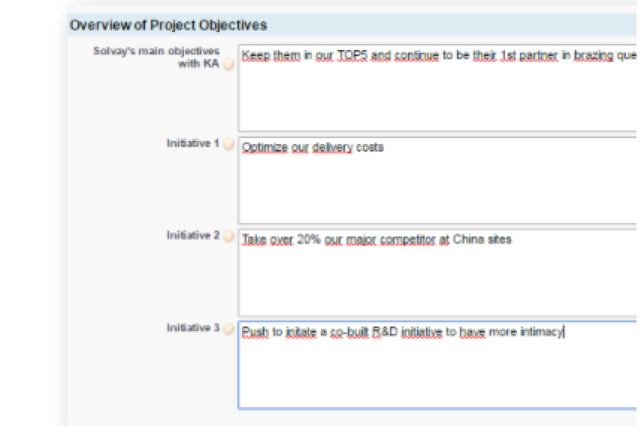
4 He now can start *filling* the **information** in the different fields.

•The field **Account Plan Stage** is used to define the stage. Following values are available:

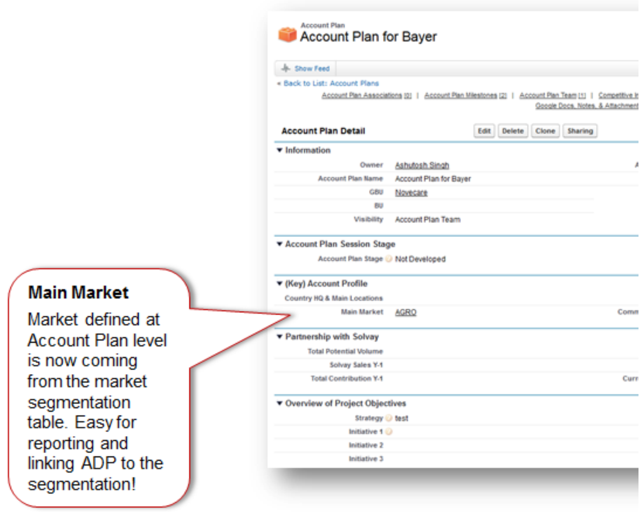
•David will define the stage as Pending Approval

5 Among the fields available, the field **Strategy** is key in order to summarize in a few lines the strategy.

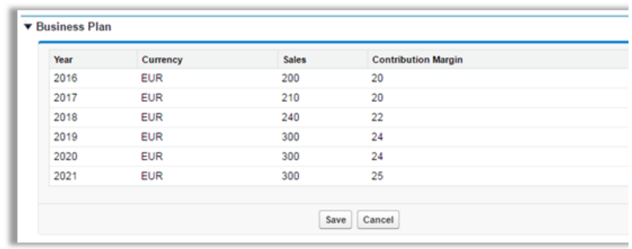
6 Next to this field, 3 key global initiatives can be defined to explicit global actions



7 David has now created his Account Plan. He must not forget to also define the Business Plan



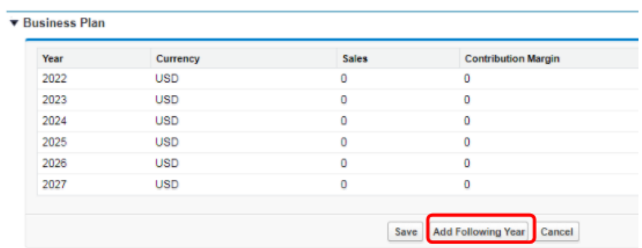
8 To define the business plan, David *double-clicks* on each **value** in order to edit it. Once the table finished, he *clicks* on **Save**.
Special Chem users use the Commercial Roadmap module, do not have to update the business plan because it is automatically synchronized with the Commercial Roadmaps set on the associated Accounts.
According to Commercial Excellence Guidelines, Business Plan allows to anticipate revenues for current year + 5 years.


Business Plan

Year	Currency	Sales	Contribution Margin
2016	EUR	200	20
2017	EUR	210	20
2018	EUR	240	22
2019	EUR	300	24
2020	EUR	300	24
2021	EUR	300	25

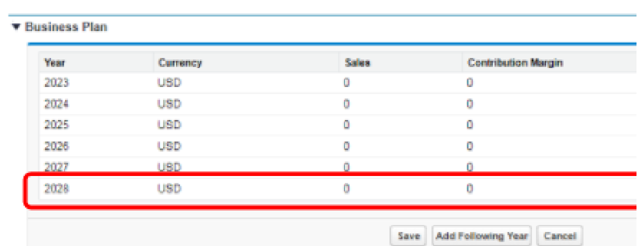
Save Cancel

9 To add another year to the Account Plan click on the button **Add Following Year.** After this a new year is generated.


Business Plan

Year	Currency	Sales	Contribution Margin
2022	USD	0	0
2023	USD	0	0
2024	USD	0	0
2025	USD	0	0
2026	USD	0	0
2027	USD	0	0

Save Add Following Year Cancel

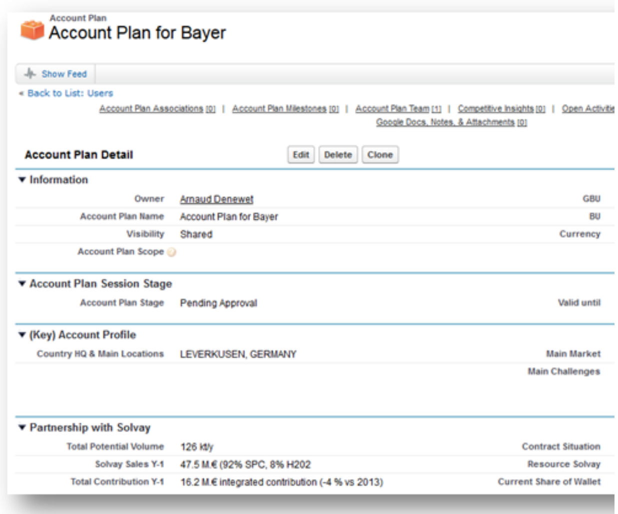

Business Plan

Year	Currency	Sales	Contribution Margin
2023	USD	0	0
2024	USD	0	0
2025	USD	0	0
2026	USD	0	0
2027	USD	0	0
2028	USD	0	0

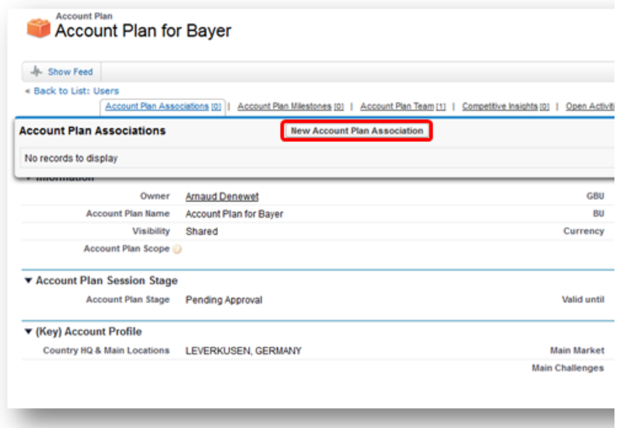
Save Add Following Year Cancel

Associate Accounts to the Account Plan

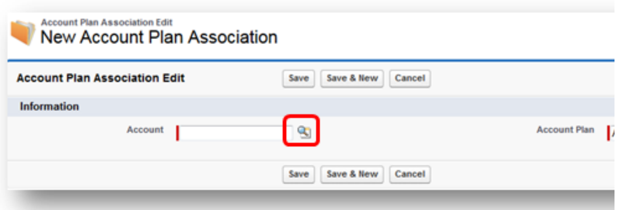
1 To associate accounts with his Account Plan, David *opens* the **Account Plan** he created



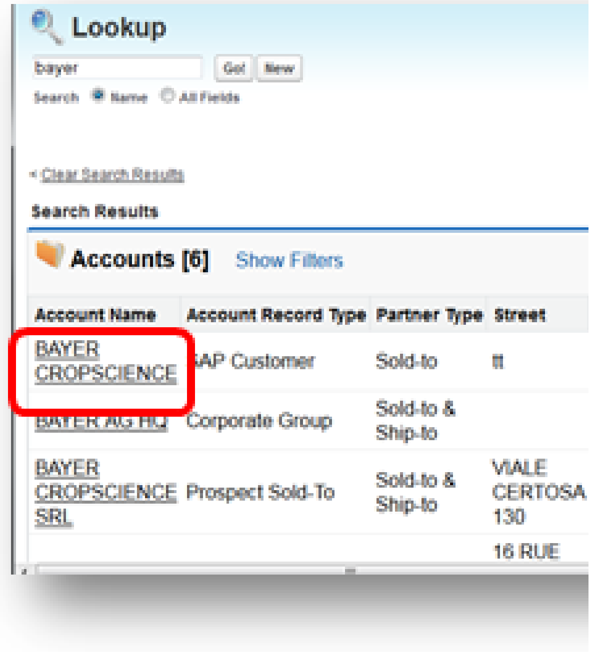
2 He *hoovers* the **Account Plan Association** and clicks on **New Account Plan Association**



3 David *uses* the **look icon** to search the accounts in the system



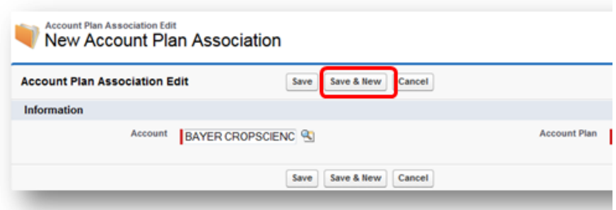
4 In the new search window, David *searches* for Bayer accounts part of the strategy and then *selects* the **account**.



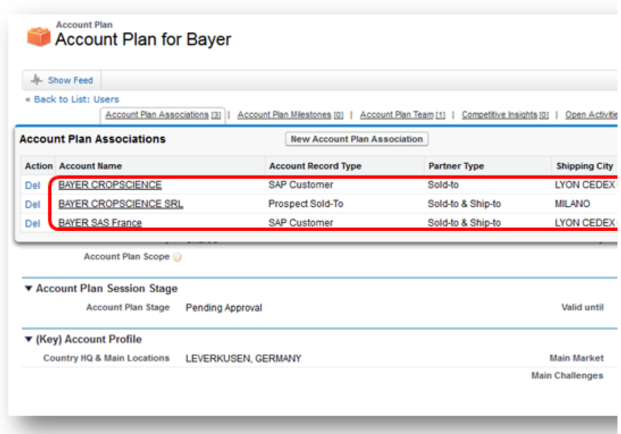
5 Once selected, David *clicks* on **Save & New** to quickly add another account

David knows it's important to associate all the accounts to the Account Plan, so that any user opening an account is aware of the Account Plan and can consult the strategy defined.

> It might take time to associate lots of accounts, but this step is only to be done once, so be patient!

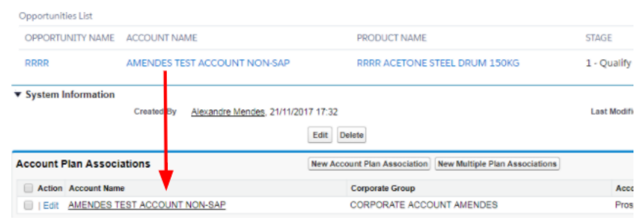


6 Once the full list of accounts associated, David can consult the account and see the accounts in the related list.

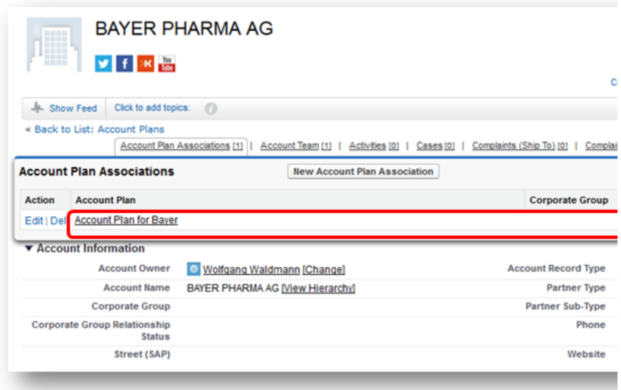


7 When a user links an opportunity to an account plan:

1. If the account of the opportunity is already in the **Account Plan Association** nothing is done.
2. Otherwise, the account of the opportunity is automatically added to the **A ccount Plan Association.**

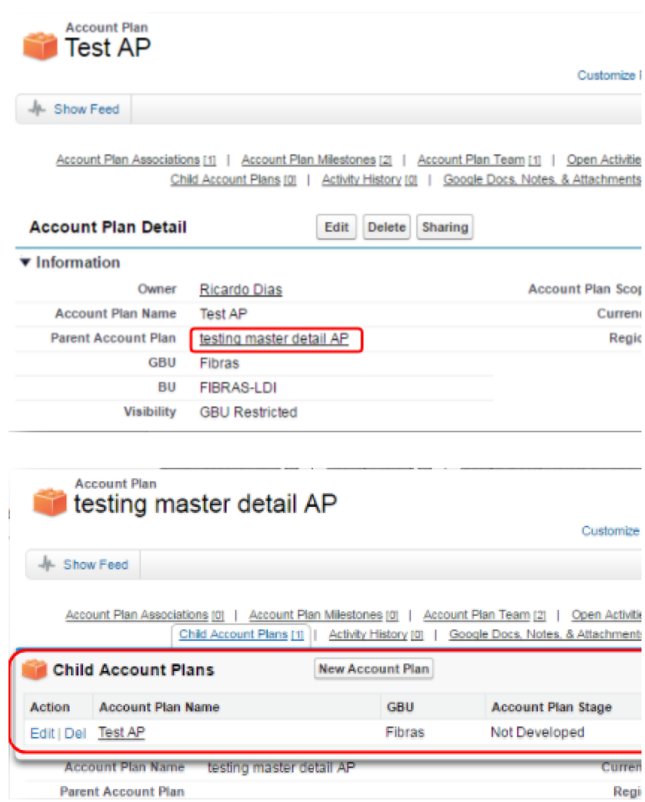


8 Once the Account related to the Account Plan, the relationship is available at account level. This relationship will be fully public, meaning David can consult any relationship in the system, whatever the visibility of the Account Plan.
•Nevertheless, he might not be able to open some Account Plans depending of his access.

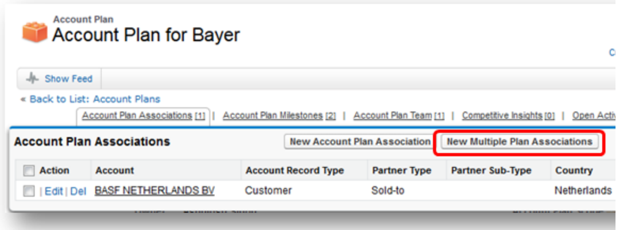


9 It is possible to create a hierarchy of Account Plan using a parent Account Plan with a region.

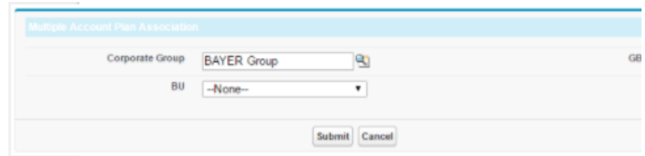
- On the parent, the child Account Plans are displayed in a dedicated related list.



10 David's GBU Data Steward has another possibility to associate Accounts to the Account Plan. From the Account Plan Association related list, he *clicks* on **New Multiple Plan Associations.**

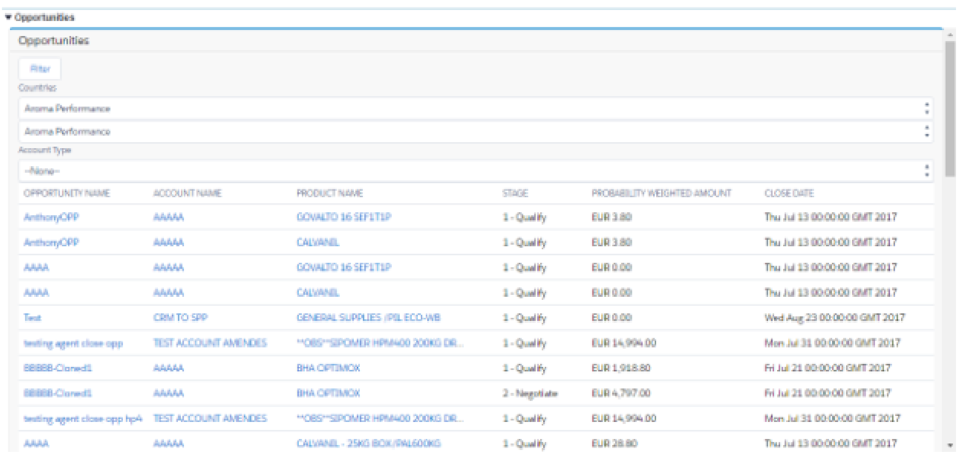


11 He selects the Corporate Group and the GBU to add only the Accounts having activity with the GBU (ie, Market Segmentation for the GBU) and clicks on Save.



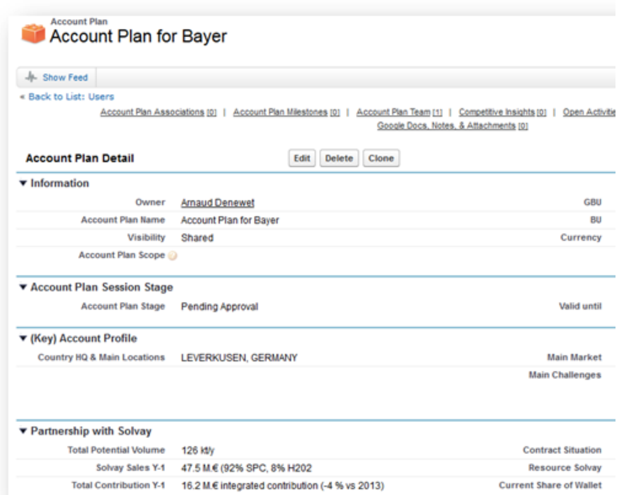
12 Done! The GBU Data Steward can see the list of all related opportunities for accounts linked to the Account Plan and Opportunities directly relate

This list can be filtered by GBU and/or BU and/or Region and/or Stage (Open/Closed Won/Closed Lost) – those filters are recorded on the record, no ne

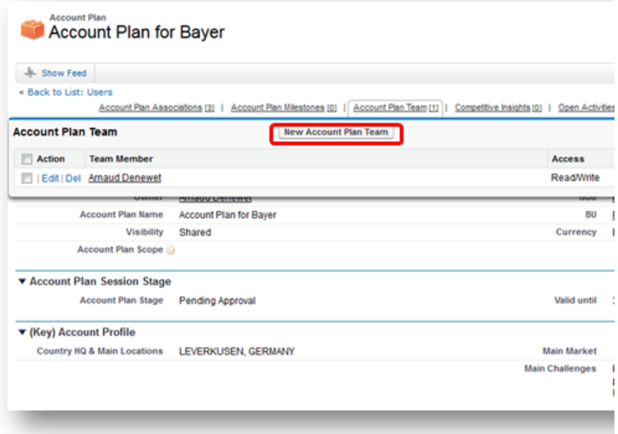


Add Colleagues to the Account Plan Team

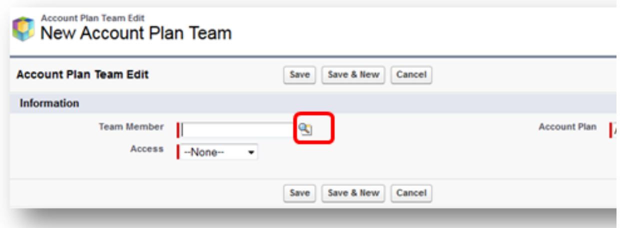
1 To associate accounts with his Account Plan, David *opens* the **Account Plan** he created



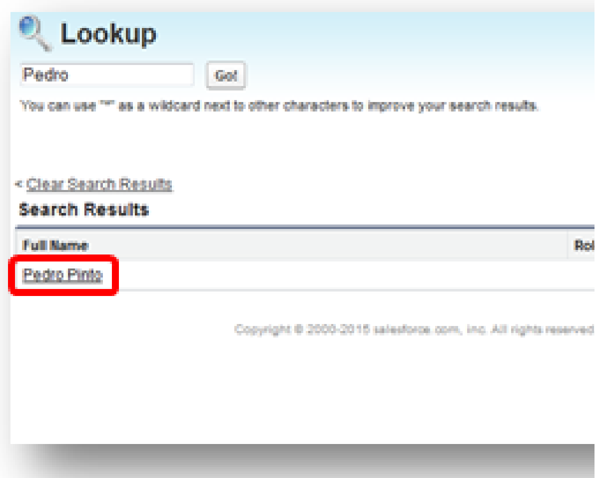
2 He *hoovers* the **Account Plan Team** and *clicks* on **New Account Plan Team**



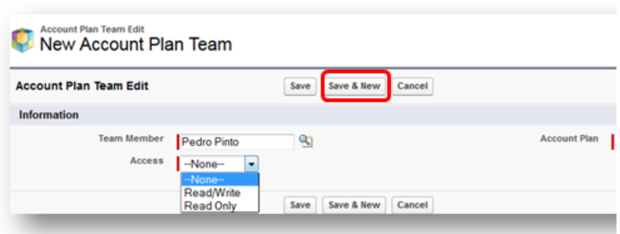
3 David *uses* the **look icon** to search the Account Managers in the system.



4 In the new search window, David *searches* for Pedro and then *clicks* on his name.



6 Once selected, David *clicks* on **Save & New** to quickly add another account

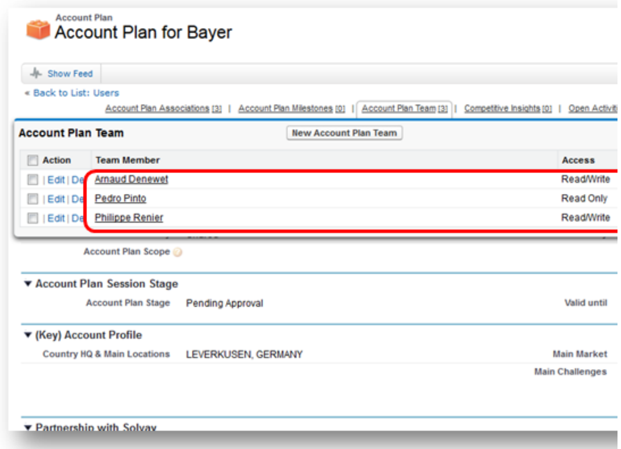


7 A field **Access** defines the level of access Pedro will have:

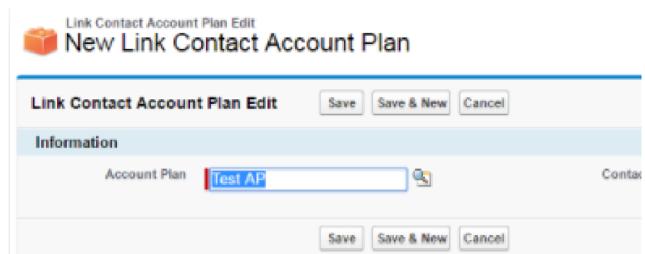
•Read/Write: Pedro will be able to edit the Account Plan information

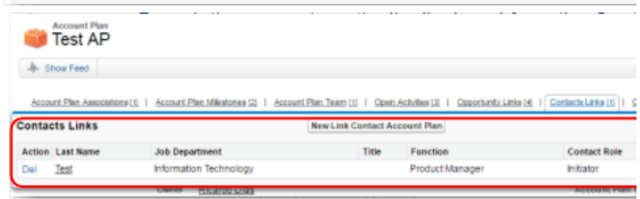
•Read Only: Pedro will only have visibility on the Account Plan (in case David has put the Account Plan as restricted to the Account Plan Team Members

8 Once the full list of Account Managers associated, David can consult the Account Plan and see the Account Managers in the related list.



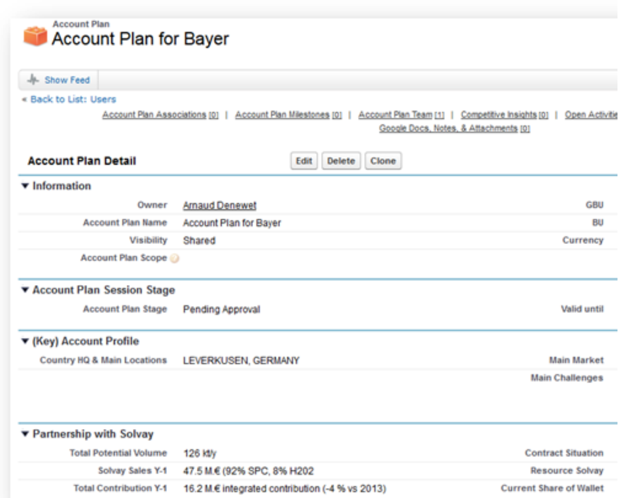
9 David can define some Contacts that are related to the Account Plan. Some information such as Job Department, Title, Function, Contact Role, and Description are automatically displayed from the Contact.



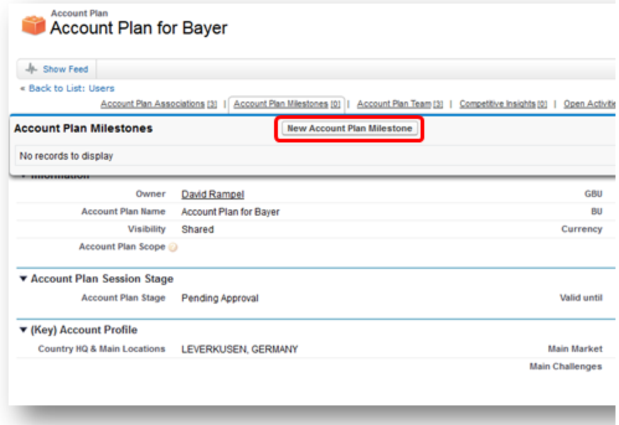


Create a milestone for the Account Plan

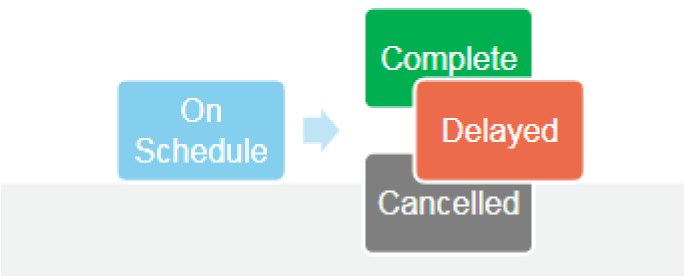
1 To create a milestone in his Account Plan, David *opens* the **Account Plan** he created

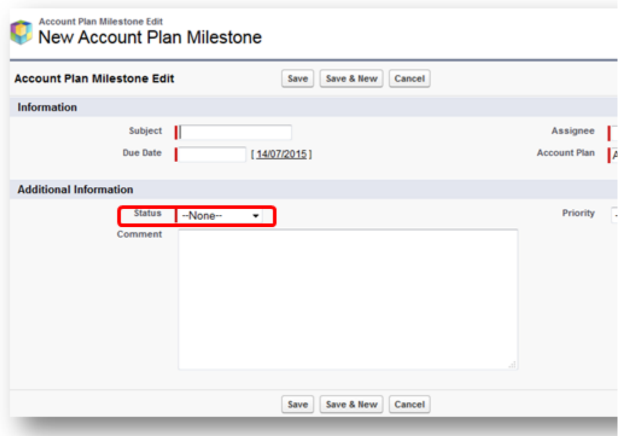


2 He *hoovers* the **Account Plan Milestone** and *clicks* on **New Account Plan Milestone**

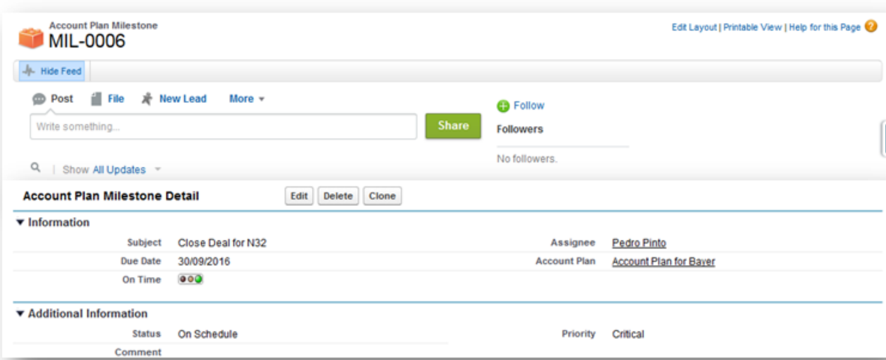


3 David *enters* now the **information** for the milestone
•The field **Status** allows David to manage the milestone status during the Account Plan period. The available status are the following:



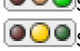


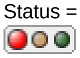
4 Once completed, David *clicks* on **Save** and *checks* the information entered.



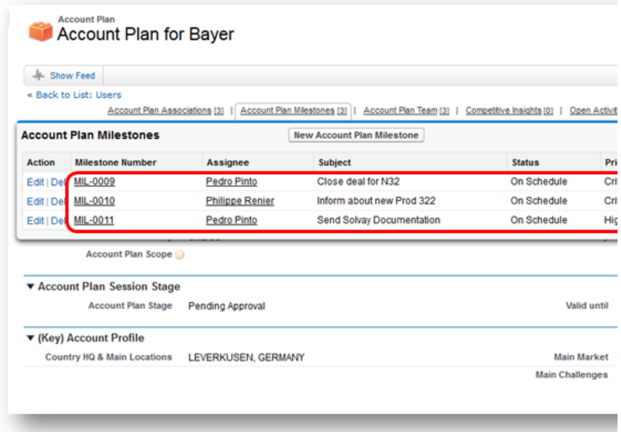
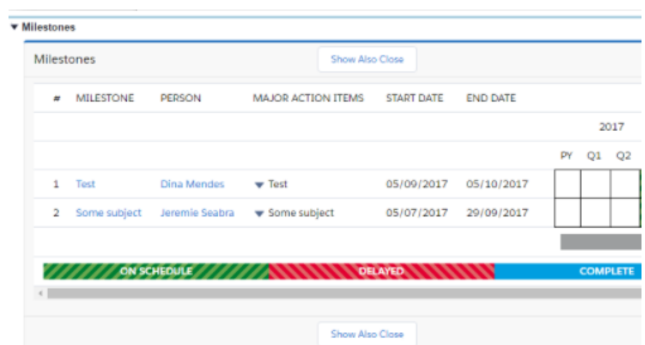
•A field **On Time** defines with traffic light the status of the milestone:

Status = Complete

Status = Delayed & Due Date > 2 Months
Status = On Schedule & Due Date < 2 Months



Status = Delayed & Due Date > 2 Months
Status = On Schedule & Due Date < Today

5 Once the full list of Milestones are created, David can consult the Account Plan and see the Milestones in the related list.	
6 Displayed milestones created in the previous year and 3 next Year Quarters are visually displayed in a dedicated section on the page. There is a button to toggle between Open Milestones and All Milestones (open + closed). The displayed color depends on the status of the Milestone.	

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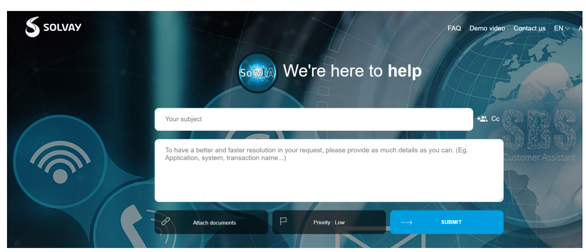
Related articles

- Account: Presentation
- Account: Create a Prospect
- Account: Account Update
- Activity: Create a customer visit in Salesforce and from Google Calendar (Lightning For Gmail Insight)
- Create a New Opportunity

Need help?

To request any support or if you have identified a bug or incident , please create a Freshdesk ticket using Solvia platform : https://solvia.solvay.com/



you can copy users with email address , default priority is Low , then Submit . We advise you to put keywords in subject to ease dispatching to correct Agent : CRM - Complaint for example