

02. Sales Planning & Account Plan

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From Prospect to Sales

Added Value

Manage Activities and Visit Reports in the CRM will help you by:

- Providing visibility on the interactions cross-GBUs with Contacts (planned or performed)
- Automating the redaction and submission of visit reports internally, or with the contacts
- Managing the history of Visit Reports, and sharing of information with the right audience

Manage Account Plans in the CRM will help you by:

- Accessing the Strategy defined for a set of accounts
- Defining the key initiatives to perform on a set of accounts
- Drive the Account management on large accounts by defining measurable "Milestones"

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What you need to know to start...

Sales Planning is the process supporting the planning, preparation, execution, and restitution of a Customer Visit. It supports the development of an Opportunity, the execution of a defined Account Plan, the collection of Leads of interest for other BU, or even the continuous management of Competitive.

Activity is a standard object used to manage "Events" and "Tasks".

A **visit report** captures the **outcome of the customer visit**. Visit report contains an internal summary of the discussion (for internal reading) and all the required elements to send the minutes to the customer. This visit report can be **shared internally and externally** from Salesforce by using predefined email templates.

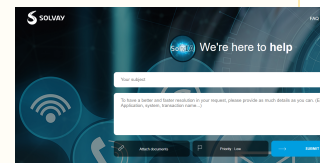
Account Plan process covers the creation and management of Account Plans in Salesforce, mainly for key accounts, but also applicable for standard accounts. An Account Plan **summarizes the strategy set up for specific accounts or groups of accounts**. Each Account Plan includes milestones detailing the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



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