

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



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

Table of content

- [Step By Step](#)
 - [Definition & Objectives](#)
 - [Solution rules](#)
 - [Confidentiality](#)
 - [An account plan can have different levels of confidentiality:](#)
 - [Demo](#)
 - [Create an Account Plan](#)
 - [Associate Accounts to the Account Plan](#)
 - [Add Colleagues to the Account Plan Team](#)
 - [Create a milestone for the Account Plan](#)
- [Related articles](#)
- [Need help?](#)

Confidentiality

An account plan can have different levels of confidentiality:

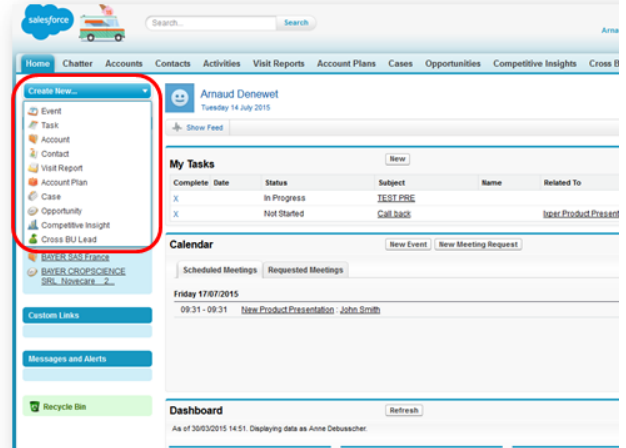
- GBU Restricted**: Your Account Plan will be restricted to your GBU CRM users
- Account Plan Team** : Your Account Plan is limited to the users identified in the "Account Plan Team"

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.

A screenshot of the 'New Account Plan' form in Salesforce. The form is titled 'Account Plan Edit' and has buttons for 'Save', 'Save & New', and 'Cancel'. The 'Information' section includes fields for Owner (User), Account Plan Name, Parent Account Plan, GBU (None), Visibility (GBU Restricted), Account Plan Scope, Currency (EUR - Euro), and Region (None). The 'Account Plan Session Stage' section includes a dropdown for Account Plan Stage (Not Developed) and a field for Valid until (13/07/2015). The '(Key) Account Profile' section includes a field for Main Market, a text area for Comment on the market, a field for Country HQ & Main Locations, and a field for KA Challenges. A rich text editor is visible at the bottom of the form.

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:

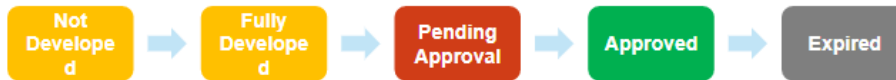
- "Shared"**: it means the Account Plan is visible by all the users in Salesforce
- "GBU restricted"**: it means only the users in the field GBU are able to see the Account Plan
- "Account Plan Team"**: only the colleagues added in the "Account Plan Team" will be able to view the Account Plan

•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

Account Plan for Bayer

Show Feed

Back to List: Account Plans

Account Plan Associations (2) | Account Plan Milestones (2) | Account Plan Team (1) | Competitors (2) | Quick Docs, Notes, & Attachments

Account Plan Detail

Information

Owner: Ashutosh Singh

Account Plan Name: Account Plan for Bayer

GBU: Novartis

BU:

Visibility: Account Plan Team

Account Plan Session Stage

Account Plan Stage: Not Developed

(Key) Account Profile

Country HQ & Main Locations

Main Market: AGBQ

Partnership with Solvay

Total Potential Volume

Solvay Sales Y-1

Total Contribution Y-1

Overview of Project Objectives

Strategy: test

Initiative 1

Initiative 2

Initiative 3

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

Account Plan
Account Plan for Bayer

Show Feed

Back to List: Users

Account Plan Associations (0) | Account Plan Milestones (0) | Account Plan Team (1) | Competitive Insights (0) | Open Activity
Google Docs, Notes, & Attachments (0)

Account Plan Detail

Edit Delete Clone

Information

Owner	Arnaud Denervat	GBU
Account Plan Name	Account Plan for Bayer	BU
Visibility	Shared	Currency
Account Plan Scope		

Account Plan Session Stage

Account Plan Stage	Pending Approval	Valid until
--------------------	------------------	-------------

(Key) Account Profile

Country HQ & Main Locations	LEVERKUSEN, GERMANY	Main Market
		Main Challenges

Partnership with Solvay

Total Potential Volume	126 Hdy	Contract Situation
Solvay Sales Y-1	47.5 M€ (92% SPC, 8% H202)	Resource Solvay
Total Contribution Y-1	15.2 M€ integrated contribution (-4 % vs 2013)	Current Share of Wallet

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

Account Plan
Account Plan for Bayer

Show Feed

Back to List: Users

Account Plan Associations (0) | Account Plan Milestones (0) | Account Plan Team (1) | Competitive Insights (0) | Open Activity
Google Docs, Notes, & Attachments (0)

Account Plan Associations

New Account Plan Association

No records to display

Information

Owner	Arnaud Denervat	GBU
Account Plan Name	Account Plan for Bayer	BU
Visibility	Shared	Currency
Account Plan Scope		

Account Plan Session Stage

Account Plan Stage	Pending Approval	Valid until
--------------------	------------------	-------------

(Key) Account Profile

Country HQ & Main Locations	LEVERKUSEN, GERMANY	Main Market
		Main Challenges

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

Account Plan Association Edit
New Account Plan Association

Account Plan Association Edit

Save Save & New Cancel

Information

Account		Account Plan
---------	--	--------------

Save Save & New Cancel

4

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

Lookup

bayer

Search ☒ Name ☐ All Fields

< [Clear Search Results](#)

Search Results

Accounts [6] [Show Filters](#)

Account Name	Account Record Type	Partner Type	Street
BAYER CROPSCIENCE	SAP Customer	Sold-to	tit
BAYER AG HQ	Corporate Group	Sold-to & Ship-to	
BAYER CROPSCIENCE SRL	Prospect Sold-To	Sold-to & Ship-to	VIALE CERTOSA 130 16 RUE

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!

Account Plan Association Edit

New Account Plan Association

Account Plan Association Edit

Information

Account **BAYER CROPSCIENCE** Account Plan

6

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

Account Plan

Account Plan for Bayer

[Show Feed](#)

[Back to List: Users](#)

[Account Plan Associations \[3\]](#) | [Account Plan Milestones \[0\]](#) | [Account Plan Team \[1\]](#) | [Competitive Insights \[0\]](#) | [Open Activity](#)

Account Plan Associations

Action	Account Name	Account Record Type	Partner Type	Shipping City
Del	BAYER CROPSCIENCE	SAP Customer	Sold-to	LYON CEDEX
Del	BAYER CROPSCIENCE SRL	Prospect Sold-To	Sold-to & Ship-to	MILANO
Del	BAYER SAS France	SAP Customer	Sold-to & Ship-to	LYON CEDEX

Account Plan Scope

Account Plan Session Stage

Account Plan Stage Pending Approval Valid until

(Key) Account Profile

Country HQ & Main Locations LEVERKUSEN, GERMANY Main Market
Main Challenges

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 **Account Plan Association**.

Opportunities List			
OPPORTUNITY NAME	ACCOUNT NAME	PRODUCT NAME	STAGE
RRRR	AMENDES TEST ACCOUNT NON-SAP	RRRR ACETONE STEEL DRUM 150KG	1 - Qualify
▼ System Information			
Created by: Alexandre Mendes, 21/11/2017 17:32			
Last Modified: [Edit] [Delete]			
Account Plan Associations			
New Account Plan Association New Multiple Plan Associations			
Action	Account Name	Corporate Group	Account Plan Stage
[Edit] [Delete]	AMENDES TEST ACCOUNT NON-SAP	CORPORATE ACCOUNT AMENDES	Pros

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.

BAYER PHARMA AG			
Show Feed Click to add topics: [?]			
Back to List: Account Plans			
Account Plan Associations [1] Account Team [1] Activities [0] Cases [0] Complaints (Ship To) [0] Complaints			
Account Plan Associations			
New Account Plan Association			
Action	Account Plan	Corporate Group	
[Edit] [Delete]	Account Plan for Bayer		
▼ Account Information			
Account Owner: Wolfgang Waldmann [Change]			
Account Name: BAYER PHARMA AG [View Hierarchy]			
Corporate Group: [Partner Type]			
Corporate Group Relationship: [Partner Sub-Type]			
Status: [Phone]			
Street (SAP): [Website]			

9

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

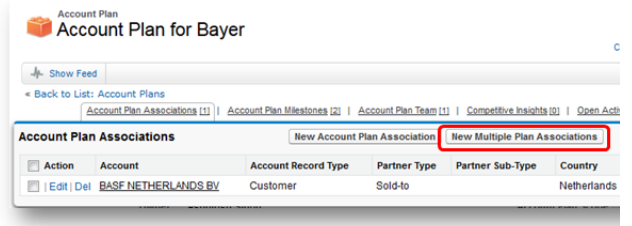
- On the parent, the child Account Plans are displayed in a dedicated related list.

Account Plan Test AP			
Show Feed			
Account Plan Associations [1] Account Plan Milestones [2] Account Plan Team [1] Open Activities [0] Child Account Plans [0] Activity History [0] Google Docs, Notes, & Attachments			
Account Plan Detail			
[Edit] [Delete] [Sharing]			
▼ Information			
Owner	Ricardo Dias	Account Plan Score	
Account Plan Name	Test AP	Current	
Parent Account Plan	testing master detail AP	Region	
GBU	Fibras		
BU	FIBRAS-LDI		
Visibility	GBU Restricted		

Account Plan testing master detail AP			
Show Feed			
Account Plan Associations [0] Account Plan Milestones [0] Account Plan Team [2] Open Activities [0] Child Account Plans [1] Activity History [0] Google Docs, Notes, & Attachments			
Child Account Plans			
New Account Plan			
Action	Account Plan Name	GBU	Account Plan Stage
[Edit] [Delete]	Test AP	Fibras	Not Developed
Account Plan Name: testing master detail AP			
Parent Account Plan: [Region]			

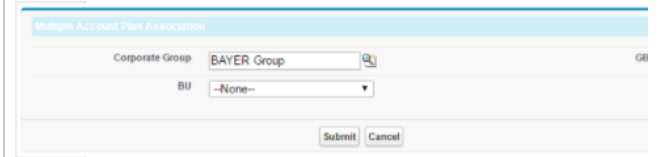
10

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

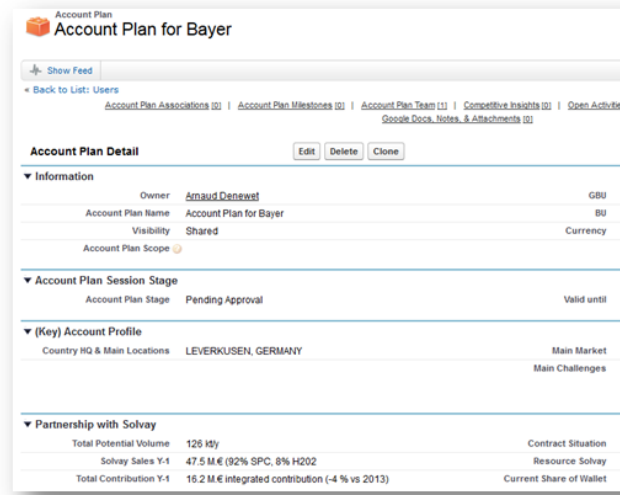
Done! The GBU Data Steward can see the list of all related opportunities for accounts linked to the Account Plan and Opportunities directly relate. This list can be filtered by GBU and/or BU and/or Region and/or Stage (Open/Closed Won/Closed Lost) – those filters are recorded on the record, no ne

Opportunities					
Opportunities					
Filter					
Countries					
Arzoma Performance					
Arzoma Performance					
Account Type					
-None-					
OPPORTUNITY NAME	ACCOUNT NAME	PRODUCT NAME	STAGE	PROBABILITY WEIGHTED AMOUNT	CLOSE DATE
AnthonyOPP	AAAAA	GOVATO 16 SEFTSP	1 - Qualify	EUR 3.80	Thu Jul 13 00:00:00 GMT 2017
AnthonyOPP	AAAAA	CALVANEL	1 - Qualify	EUR 3.80	Thu Jul 13 00:00:00 GMT 2017
AAAA	AAAAA	GOVATO 16 SEFTSP	1 - Qualify	EUR 0.00	Thu Jul 13 00:00:00 GMT 2017
AAAA	AAAAA	CALVANEL	1 - Qualify	EUR 0.00	Thu Jul 13 00:00:00 GMT 2017
Test	CRM TO SRP	GENERAL SUPPLIES /PIL ECO-WB	1 - Qualify	EUR 0.00	Wed Aug 23 00:00:00 GMT 2017
testing agent close opp	TEST ACCOUNT AMENDES	**OBS**SPOMER HPRAND 200KG DR...	1 - Qualify	EUR 14,994.00	Mon Jul 31 00:00:00 GMT 2017
BBBBB-Closed	AAAAA	BHA OPTIMOK	1 - Qualify	EUR 1,918.80	Fri Jul 21 00:00:00 GMT 2017
BBBBB-Closed	AAAAA	BHA OPTIMOK	2 - Negotiate	EUR 4,797.00	Fri Jul 21 00:00:00 GMT 2017
testing agent close opp hpr	TEST ACCOUNT AMENDES	**OBS**SPOMER HPRAND 200KG DR...	1 - Qualify	EUR 14,994.00	Mon Jul 31 00:00:00 GMT 2017
AAAA	AAAAA	CALVANEL - 25KG BOM/PALESONG	1 - Qualify	EUR 28.80	Thu Jul 13 00:00:00 GMT 2017

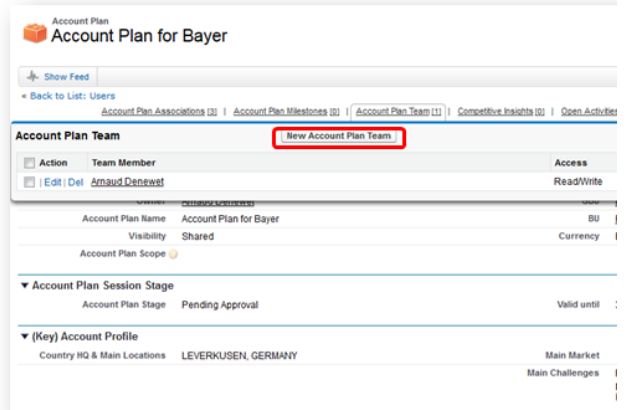
Add Colleagues to the Account Plan Team

1

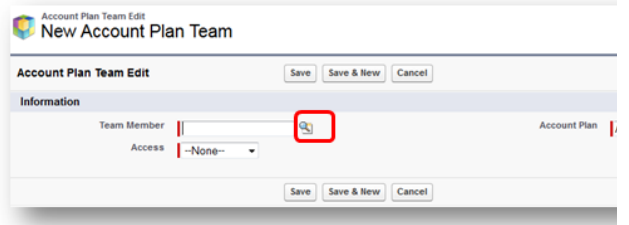
To associate accounts with his Account Plan, David *opens* the **Account Plan** he created



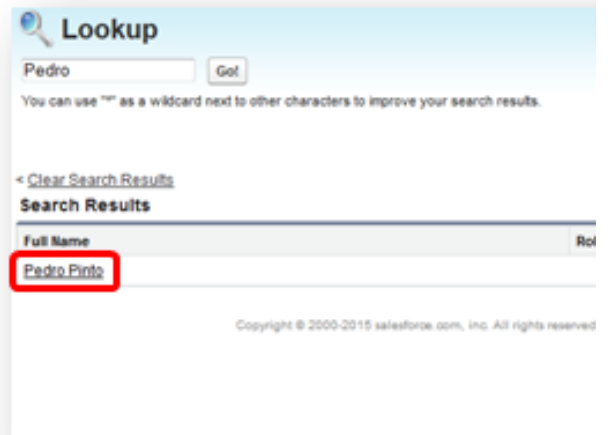
2 He *hoovers* the **Account Plan Team** and *clicks* on **New Account Plan Team**



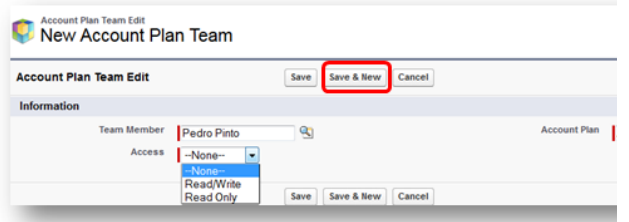
3 David uses the **look icon** to search the Account Managers in the system.



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**

Account Plan
Account Plan for Bayer

Show Feed

Back to List: Users

Account Plan Associations (3) | Account Plan Milestones (0) | Account Plan Team (3) | Competitive Insights (0) | Open Activity

Account Plan Milestones New Account Plan Milestone

No records to display

Owner	David Rampel	GBU
Account Plan Name	Account Plan for Bayer	BU
Visibility	Shared	Currency
Account Plan Scope		

▼ Account Plan Session Stage

Account Plan Stage	Pending Approval	Valid until
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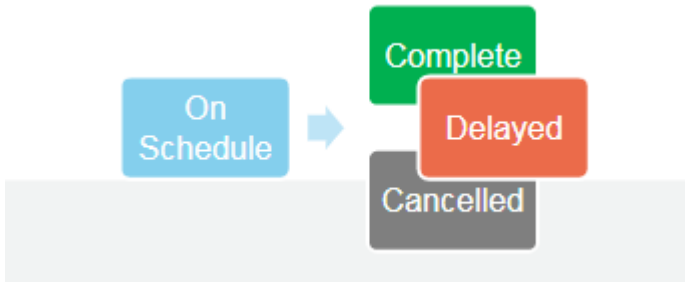
▼ (Key) Account Profile

Country HQ & Main Locations	LEVERKUSEN, GERMANY	Main Market
		Main Challenges

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:



Account Plan Milestone Edit
New Account Plan Milestone

Save Save & New Cancel

Information

Subject [] Assignee []

Due Date [] [14/07/2015] Account Plan []

Additional Information

Status --None-- Priority []

Comment []

Save Save & New Cancel

4

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

Account Plan Milestone
MIL-0006

Edit Layout | Printable View | Help for this Page

Hide Feed

Post File New Lead More

Write something... Share Follow

Followers

No followers.

Show All Updates

Account Plan Milestone Detail Edit Delete Clone

▼ Information

Subject	Close Deal for N32	Assignee	Pedro Pinto
Due Date	30/09/2016	Account Plan	Account Plan for Bayer
On Time	🟢🟢🟢		

▼ Additional Information

Status	On Schedule	Priority	Critical
Comment			

•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.

Action	Milestone Number	Assignee	Subject	Status	Pri
Edit De	MIL-0009	Pedro Pinto	Close deal for N32	On Schedule	Cri
Edit De	MIL-0010	Philippe Renier	Inform about new Prod 322	On Schedule	Cri
Edit De	MIL-0011	Pedro Pinto	Send Solvay Documentation	On Schedule	Hi

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.

#	MILESTONE	PERSON	MAJOR ACTION ITEMS	START DATE	END DATE
1	Test	Dina Mendes	Test	05/09/2017	05/10/2017
2	Some subject	Jeremie Seabra	Some subject	05/07/2017	29/09/2017

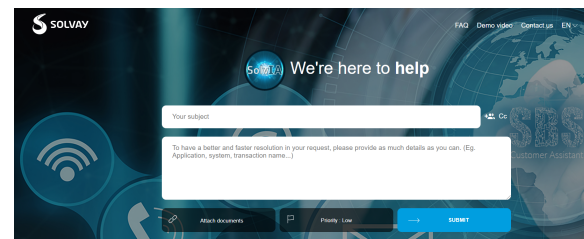
[Back to the top](#)

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