# FD - P4. Account Plan Management

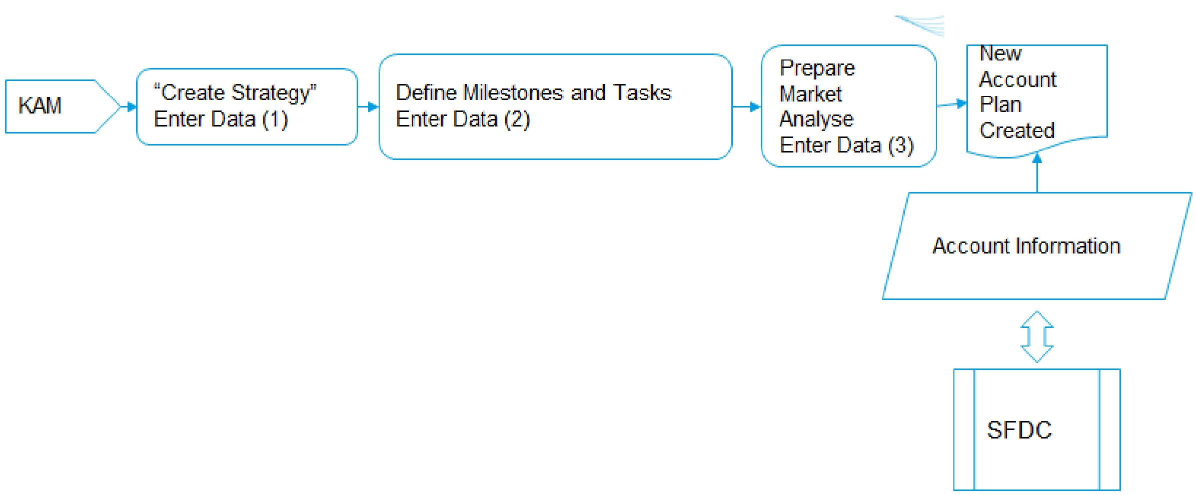


## 1. Functional Process

### Process Overview

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.




## Definition & Use cases

### Definition

The preparation of the Account plan is typically managed out of Salesforce, based on several data sources. The Account Plan is created in Salesforce as a formalization of the strategy to apply.

Salesforce can support the final validation of an Account Plan.

Once the account plan is created in Salesforce and approved. The execution of the strategy and follow-up of milestones is entirely managed in Salesforce.

The Account Plan is regularly updated to remain a living document.

The Account Plan Milestone object contains all the milestones defined for the Account Plan. Milestones are the task/to-do's defined in the strategy and listed in the Account Plan. Milestones can have an assignee different from the Account Plan Owner, meaning the Account Plan Owner can delegate certain tasks of the Account Plan to different Account Managers.

Finally, the Chatter functionality is enabled on the object to still enhanced collaboration between the Account Plan's stakeholders.

## Use cases

- A GBU wants to **define a strategy for a Key Account** to develop sales and to keep track of the actions defined to achieve it
- A GBU wants to **define an Account Plan for a list of selected accounts** to develop their relation with them and develop sales

# 2. Data Model & security

## Account Plan

An Account plan is splitted over 6 sections:

  - Information: this section includes the general information like the Owner, the Account Plan Name, the Visibility, the GBU, etc.
  - Account Plan Session Stage: This section displays the Account Plan Stage and the Valid Until date
  - (Key) Account Profile: this section defines the Main Market, a Main Market description, main challenges and locations. The Key Account Profile section is displayed in figure 31 below.
  - Partnership with Solvay: this section displays some financial information
  - Overview of Project Objectives: this section lists the strategy and the 3 key initiatives
  - Business Plan: this table covers the sales, contribution margin and share of wallet projection for next 5 years

## Related Objects

- ***Account Plan Associations***: displays all the Accounts linked to the Account Plan
- ***Child Account Plans***: displays all the children Account Plans related to this parrent Account Plan
- ***Account Plan Milestones***: displays all the Milestones defined for the Account Plan
- ***Account Plan Team***: displays all the users linked to the Account Plan
- ***Contact Links***: displays all the Contacts linked to the Account Plan
- ***Competitive Insight***: displays all the Competitive Insights linked to the Account Plan
- ***Open Activities***: log activities (task, event) related to the Account Plan
- ***Opportunities***: displays Opportunities linked to the Account Plan, allows to create a new Opportunity directly from there or to relate an existing one
- **Google Docs, Notes & Attachments**: allow to attach document to the opportunity.

## Account Plan security model

| | |
|---|---|
| **Who can create?** | Any sales user can create an Account Plan |
| **Who can see?** | 2 rules have been set up:<br><br>1) If field "Visibility" = "GBU Restricted" only sales in the GBU defined in the field "GBU" on the Account Plan have the possibility to see the Account Plan.<br><br>2) If field "Visibility" = "Account Plan Team" only the owner and sales in the Account Plan team, and users above in the account hierarchy have the possibility to see the Account Plan.<br><br>NB: none of the user in Restricted Region can see an Account Plan (except the ones created by users in Restricted Region) |
| **Who can update?** | The Account Plan owner, users in the Account Plan Team with read/Write access, and users above in the account hierarchy. The Salesforce admin.<br><br>Account plan owner can add and delete Account Plan team members.<br>GBU Data Stewart can add and delete Account Plan team members on Account Plan that belongs to its GBU. |
| **Who can delete?** | Only the System Administrators can delete an Account Plan. Other users will set the status on "Expired" |

## Account Plan Association security model

| | |
|---|---|
| **Who can create?** | To associate an account to an account plan, the user needs to be in the Account Team of the Account.<br>Otherwise he will not be able to add this account and he will receive an error message : “I nsufficient rights”. |
| **Who can see?** | Any sales rep has visibility on the association Account – Account Plan, in order to inform him that an Account Plan, from his GBU or not, is existing. Account Plan Visibility remains GBU Restricted or Confidential |
| **Who can update?** | The user who created the relationship, the administrator |
| **Who can delete?** | The user who created the relationship, the administrator |

### Account Plan Milestone security model

| | |
|---|---|
| **Who can create?** | Any sales with read/write permission on the Account Plan and users above in the role hierarchy can create a Milestone |
| **Who can see?** | Any sales with visibility on the Account Plan can see a Milestone |
| **Who can update?** | Any sales with read/write permission on the Account Plan can create a milestone, and users above in the role hierarchy. The Administrator and the Milestone assignee too |
| **Who can delete?** | The Administrator. Users with edit rights will edit the status to “Cancelled” |

# 4. Specific rules & automation

## *Mandatory fields for Account Plan creation*

The following fields are mandatory at Account Plan creation:

- Owner
- GBU (defaulted based on the GBU of the user)
- Visibility
- Account Plan Name
- Account Plan Stage
- Valid Until

### GBU Special Chem distinctive feature

For GBU Special Chem, Business Plan lines are not editables as they are synchronised with Commercial Roadmap (for more detail refer to Commercial Roadmap Functional Design).

Unit Of Measure used by Special Chem for the Commerical Roadmap are kilo pound (LB) and ton (T).

Picklist field Unit of Measure is using a global picklist with values : KG, T, LB, SH, T.

### Account Plan Alert

In order to alert an Account Manager that the Account Plan will reach the validity date, a rule have been set up so that the system will send a mail (only once) to the Account Plan Owner when the Account Plan reaches expiration (2 months before)

### Account Plan Contribution Margin

On the Account Plan object, in the Business Plan table, a rule is set up to verify that the Contribution Margin entered by the sales rep (field in % without decimals) hasn't a value higher that Sales.

## Account Plan Owner

Account Plan Owner is automatically added to the Account Plan Team as team member.

## Account Plan Association Creation

Account Plan Association creation can be done by any sales having visibility on the Account Plan

Accounts linked to an account plan can be any account but Corporate Groups and ship-to.

The current approach to assign accounts to an Account Plan is to link them one by one.

In case a large number of accounts has to be linked, the system admin can support it via data load.

***Mandatory fields for Account Plan Association creation***

The following fields are mandatory at Account Plan Association creation:

- Account
- Account Plan
- Account Plan Association at Corporate Group level

The possibility is given to the GBU Data Steward of the account plan owner to create multiple associations Corporate Group – Account at once. For that, user can click on the button "New Multiple Plan Associations" available in the related list.

This feature is restricted to users with profile GBU Data Steward or System Administrator.

By clicking on this button, the user is able to select a Corporate Group and a GBU or BU (via 2 lookup fields) for which new associations "Accounts – Account Plan" will be created.

When the user selects a GBU the list of available BUs is automatically filtered

All the accounts attached to the Corporate Group that has been selected by the user (also filters on GBU and BU if selected) will automatically be linked to the Account plan.

## Account Plan Association Partner Type

Only Sold-to Accounts and Ship-to Accounts can be related to an Account Plan. As explained before Corporate Groups are handled through Multiple Account Plan Associations.

## Account Plan Visibility at Account level

Independently of the visibility that has been set by the user on the Account Plan, any Account plan is visible at Account level. The user will know then than another GBU is active and has an account plan associated to a particular account record, which will foster collaboration between GBUs.

Depending on the Record's visibility (GBU Restricted or Confidential for the Account Plan Team Members), the Account Plan record itself might be blocked however to some users.

**Visually displayed Milestones**

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.

**Display related Opportunities**

A list of all related opportunities for Accounts linked to the Account Plan and Opportunities directly related to an Account Plan is displayed in a dedicated section in the page.

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 need to reselect them when opening a previously opened and filtered record.

3 dashboard components are also displayed and filtered using defined filters (if any):

- Opportunities 4 Years Forecast
- Opportunities per BU
- Opportunities per Market

### Account Plan Notification

An automatic notification (email) is sent to the account plan owner when we are at X days before the valid date: 15, 30, 45, 60, 90 days before valid until date.

# Lightning

## Business Plan

The VF has been remove to build a lightning component similar to what we have in opportunity product forecasts.

## Milestones

Milestones are now based on standard Task object. The component has two switch button:

- "Show also closed": displays milestones with status 'Completed'.
- "Show Details": displays columns Assign To/Start Date/End Date.

## Accout Plan Associations

ADP associations are now handle with a new component similar to the 360° customer view:

1. The user use filters to search on accounts.
2. He selects the accounts he is interested in.
3. He adds them to selection and save when his list is ok.

## Components

### Account Plan Team:

The component replace the related list. It displays opportunity team members and allow to manage the team (add, edit remove members).

### Related Contacts:

The component replace the related list. It allows to link several contacts to the same opportunity.

**Last modifications :**

| User | Last Update |
|---|---|
| Emilien GUICHARD | 3163 days ago |
| Laura THEOLIER-EXT | 2728 days ago |
| Julien Andreoli-ext | 2987 days ago |
| Leila Radjah | 2910 days ago |
| BRAHIM, Walid | |
| KANJA-ext, Zakaria | |
| NWANGWU, Daniel | |

She can see the list of all related opportunities for accounts linked to the Account Plan and Opportunities directly related to an Account Plan in a dedicated section in the page.
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 need to reselect them when opening a previously opened and filtered record.