

P4. Account Plan Management

Presentation

Training Materials

Definitions & 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 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.

- [Training presentation](#)
- [Tutorial videos](#)

Process Overview

