

Key Account Planning Solution



Building **better client relationship**

The real assets of a business are embedded in the quality of relationships between the company and its key stakeholders such as clients, partners and vendors. Developing, nurturing and maintaining long standing relationships with clients should therefore be top priority for any business. A recent study reveals the following:

- Most businesses recognize that they need a better strategy to select key accounts
- Several companies loose deals because their competitors have established better relationships with customers
- More than half of the companies interviewed believe that their key account plan needs improvement and they are currently not fully leveraging the potential of their key accounts

Bodhtree's Solution

Bodhtree's key account planning solution offers a single platform where sales managers can identify and segment their key accounts based on the organizational strategy, publish their key account plan and review progress at different milestones. With this solution, your sales organization has access to a common repository of information – the customer profile, relationship maps, sales data, won/loss analysis, internal organizational charts, etc., so that the sales teams have a better understanding of their clients.

The solution allows you to deploy a standard account plan for all sales reps across verticals, functions and geographies, so that best practices can be shared among all teams. Account plans are tied to specific accounts and contain the overall objectives for that account - including revenue targets, account targets, strategic challenges, top priorities, etc.

The key account planning solution empowers you to uncover new business opportunities, up sell / cross sell and align your best resources to the most profitable opportunities within your key accounts. Additionally, the solution offers KPI-based reports that enable sales leaders and top management to monitor sales results, and move the overall customer-satisfaction rating from average to an all-time high.

Highlights

- Easy to deploy and use
- Standard account plan templates based on industry best practices
- Cloud solution, removes hardware bottlenecks
- Mobile compatible

Value Proposition

- Increase customer intimacy
- Significantly improve win-rate and profitability through better opportunity qualification
- Easily navigate within accounts and build trusted relationships with C-level
- Reduce competitor influence by identifying new coaches and influencers within your accounts
- Increase revenues from your key accounts

Case Study: Improving account management at leading global engineering and networks company

The client is a global engineering and networking company. They were highly dependent on IT for generating custom reports and obtaining a universal view of their customer data was difficult. Bodhtree implemented the key account planning solution using Salesforce.com that enabled the customer to get a unified view of their key accounts, deploy a standard account management plan and track their sales teams' progress against organizational KPIs. Our solution offered custom four-dimensional reports and dashboards (bubble charts) using Google API. Automated key account management enabled sales teams to gain a better understanding of their customer's business and focus more on revenue generation activities.

