

Account Sales Planning Worksheet

Date Prepared _____

Account Manager Assigned _____

Account Name _____

Account Location _____

Account Telephone _____

Key Contacts

Name _____ Title _____

Name _____ Title _____

Name _____ Title _____

Name _____ Title _____

Name _____ Title _____

Corporate Organization Overview

Known Divisions

In there an installed vendor?

Yes No

Who _____

Is there a corporate-wide recommended vendor?

Yes No

Who _____

How long have they been the recommended vendor?

Have we sold any of their other operating divisions?

Yes No

Which ones/who?

If yes, can we leverage these relationships? How?

How is this decision being made? (Check all that apply)

- Steering Committee
- Short List
- Consultant
- RFP
- RFI
- Other

What other divisions are using the recommended vendor?

Current business pain with existing product or service or vendor?

What do we want to sell them?

What is the business dollar value the 1st year?

What is the business dollar value potential of this client over the next three years?

Do they have a stated budget?

Yes No

If so, how much _____

When do they want this product or service installed?

When do they want to be operational?

Why will they buy from us?

Why will we lose this deal?

How will we create value the prospect will believe?

Which contact(s) is/are making the decision?

Is a consultant involved?

Yes No

Name_____

Company_____

Telephone_____

Is the consultant:

For Us Against Us Neutral

What are the prospects' business consequences if they do not buy from us?

What does the selling team need to do, to close this business?

Do we need to get operational, engineering, finance or other departments involved in helping us sell this deal?

Yes No

If yes, which departments?

List any unusual marketing expenses needed to close this business:

Next actions steps:

Do we have a key account org chart of the decision team?

Yes No

Who will sign the contract?

Name _____ Title _____

Will the contract have to go to purchasing?

Yes No

Key Contract Signer Approach Strategies

Contract Decision Maker _____ Title _____

Key decision maker approach strategies

Contract Decision Maker _____ Title _____

Key decision maker approach strategies

Contract Decision Maker _____ Title _____

Key decision maker approach strategies

Contract Decision Maker _____ Title _____

Key decision maker approach strategies

Key decision maker's political environment

Return on Investment (ROI) expectations by decision makers

Return on Investment (ROI) calculation method for this sale

Are there any relationships with our existing customer base to this prospect?

Yes No

If Yes, Who?

Other information that is important about this sale

Other Services from The CxO Group

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The CxO Group offers value forward sales, marketing, strategy and financial management services to clients seeking to increase corporate revenue including:

- Event Speaking**
- Sales and Marketing Strategy Development and Consulting**
- CEO / Executive Coaching**
- Team Sales Training**
- Strategic Planning**

Value Forward Selling

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HOW TO SELL TO MANAGEMENT:

Become a peer in the boardroom, instead of a vendor waiting in the hallway! ®

The CxO Group's sales training course is designed to teach you how to sell to management using a Value Forward approach.

Today, most firms pull their value behind themselves and force their company into a commodity position with their competitors.

When firms say, "we have great service," "we are customer centric," or "our offerings are the best,"- they just sound like their competition.

When you market and sell like your competitors – you become identical to your competitors . . . and you have to price like your competitors.

Instead, put your business value in front of you!

This course is custom fit to your firms needs and includes:

- Strategic Sales Call Planning Methods
- Management Prospect Communication Methods
- Sales Lead Generation Methods
- Cold Calling Techniques and Scripts
- Executive Briefing and Demo Techniques
- Senior Management Negotiation Sales Methods to Win Business
- Managing Competition and Closing the Sale
- Corporate Value Positioning Methods So Management Sees You as a Specialist
- Sales Proposal Development and Delivery Methods

TELESEMINAR / ONSITE WORKSHOPS FROM THE CXO GROUP

- How to Cold Call Senior Management, Create Value and Set Up More Appointments
- Sales Training 101 - Sales Training for New and Non-Salespeople
- Developing a Sales Plan, Calculating Sales Quota, and Managing Sales by Metrics
- How to Give a Demo, Executive Briefing, or Webinar to Senior Management and Win Deals
- How to Get Promoted to Sales Management or VP of Sales
- Sales Manager Leadership Methods That Increase Your Sales Team's Performance
- CEO Leadership Methods That Create a Value-Forward Business Model
- How to Hire the Right Salesperson
- How to Develop a Marketing Plan That Gets Accepted by Management Every Time
- Value Forward Marketing: Value First, Brand Second
- How to Develop a Reseller Channel and/or Become a Vendor Partner
- How to Sell to the Federal Government
- How to Sell IT, Software and Services into the U.S.
- How to Handle Sales Objections, Improve Your Negotiating Skills, and Close More Deals
- How to Develop a Proposal That Makes Management Buy
- How to Use Storytelling as an Advanced Sales Tool
- How to Manage Your Time More Effectively and Sell More in Less Time
- How to be a Customer-Driven Company
- How to Grow Your Existing Business
- Successful Sales and Marketing for Trade Shows

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The CxO News

www.thecxonews.com

The CxO News™ is published monthly and designed to help **Align Sales and Marketing with Business Strategy**. It provides best practices that **Senior Management, Marketing and Sales Executives** can use to increase corporate profitability with proven tactical and strategic sales techniques to help you sell senior management of Fortune 1000 companies and presidents of privately held firms.

It's currently read by the sales executive, CEO, CIO, president, vice president of sales, vice president of marketing, vice president of strategy and the VP at firms worldwide. To view recent articles or signup to The CxO News, please visit <http://www.thecxonews.com>

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Rick Erling speaks on sales, marketing, strategy, and leadership delivering motivational and content-rich presentations that help audiences understand how to increase their personal and corporate performance based on proven strategic and tactical actions they can take immediately.