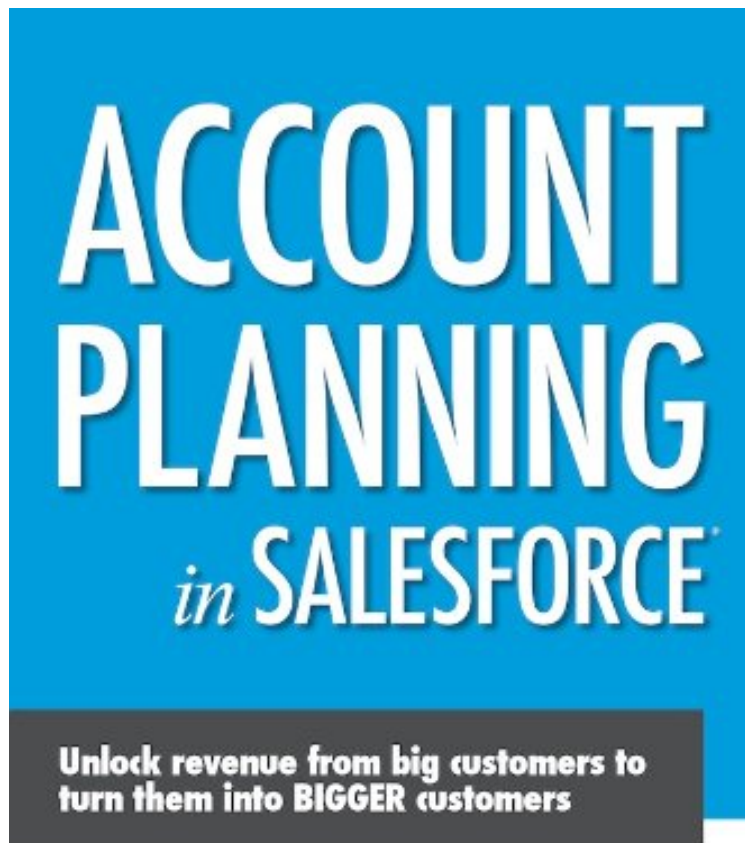


(Download free pdf) Account Planning in Salesforce: Unlock Revenue from Big Customers to Turn Them into BIGGER Customers

Account Planning in Salesforce: Unlock Revenue from Big Customers to Turn Them into BIGGER Customers

Donal Daly


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DONAL DALY

Founder and CEO of The TAS Group

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Donal Daly : Account Planning in Salesforce: Unlock Revenue from Big Customers to Turn Them into BIGGER Customers before purchasing it in order to gage whether or not it would be worth my time, and all praised Account Planning in Salesforce: Unlock Revenue from Big Customers to Turn Them into BIGGER Customers:

1 of 1 people found the following review helpful. Two StarsBy sanjay.ahuja@compaq.comDidn't get anything worthwhile out of this book. It may be helpful to a very new sales person.1 of 1 people found the following review

helpful. comprehensive in account planning but lacks specific examples
By Chad Schaeffer
Very good book to lay out a consistent template approach to account planning. However, nothing ever goes as planned and would have been nice to see real examples and case studies from step one thru deal close
0 of 1 people found the following review helpful. A modern classic with classic rock
By manhattanites
I've been hearing about Target Account Selling (TAS) for years so it was fun to learn more about its origins. Visualizing this as a native set of objects that seamlessly integrates into Salesforce CRM is a thing of beauty. Dealmaker is great software built on a solid strategic account planning methodology. The book is not constrained by the software screenshots, it's more of a springboard for the highest catalytic assessment of bringing growth into the biggest enterprise accounts. Written by an engineer and CEO, it's a uniquely informed perspective on how to unify a single view of accounts, portfolio based or with many business units. When you're marshaling supporting resources and leading from within a large account team, turning your account plan into a living, breathing document that you can execute upon year round, will give you and your organization a phenomenal competitive edge.

ACCOUNT PLANNING in SALESFORCE is focused on helping companies that have purchased Salesforce with their Account Planning initiatives. Its goal is to be the reference text on Account Planning for all Salesforce users. Account Planning is a tremendously important endeavor. It drives revenue, increases customer satisfaction, aligns your organization, and provides incredibly gratifying moments when you can see the impact of your work ndash; both for the customer, and for your company. Account Planning is a strategic imperative that goes beyond traditional selling tactics. The benefits that accrue go beyond simple revenue numbers, and point to an approach that must be focused not just on greater revenue as the sole arbiter of strategy. When Account Planning is executed well, customer satisfaction increases. Customers who are more satisfied buy more from you, and do so without calling your competitors first. Customers who are served well are easier to retain, and therefore it is easier to make your revenue targets year after year. When you do effective Account Planning, you get to understand the customer's business, sit with them at their side of the table, and strengthen your ability to shape their thinking and their business strategies. A happy customer is hostile territory for your competitor to enter. Switching suppliers is expensive for a customer and they will do so only if they feel you are not serving them well and fairly. Your ability to monitor, measure and react is greater if you are closer to the heart of their business, understanding their corporate goals, and motivations. It takes investment, research and hard work, but is the price of customer retention and growth. In ACCOUNT PLANNING in SALESFORCE, you will learn how to gather the information you need to understand the Account as a marketplace and to segment that marketplace into discrete units so that you can choose where to spend your time. Recording the Current Opportunities in the Account, as well as business you already have won, you will be able to place your solutions on a structured map of the customer's business. Exploring how to uncover the customer's Business Drivers and how to navigate the political landscape in the account will help you to understand both the people who matter ndash; the Key Players ndash; and their associated Business Drivers. When all of the opportunities in the Account have been identified, you will evaluate each one against the twin axes of Value to Customer and Value to Us. That way you will uncover areas of Mutual Value ndash; which is a thread that you will find woven into the fabric of the methodology. It is important. This is the White Space in the Account where you can help your customer to identify new potential areas of opportunity ndash; and simultaneously discover new areas of opportunity for yourself. Finally, you will build the Execution Plan so that you get beyond planning and begin to manage and execute. And to keep things interesting, you will find many musical references throughout the book ndash; this will be the only book on Account Planning that you will find that includes a song playlist!

Donal uncovers the vast advantages of Account Planning done right and shows how our own client intimacy approach has benefitted from getting closer to our customers. Patricia Elizondo, Senior Vice President, Xerox Corporation
Companies around the globe are transforming the way they connect with customers. ACCOUNT PLANNING in SALESFORCE contains valuable advice on how to use Account Planning methodology in Salesforce to accelerate revenue growth. It is a great example of how our partners are leveraging the power of the Salesforce platform to provide customers with the right tools to accelerate their success in the cloud. Ron Huddleston, Senior Vice President, ISV Channel, salesforce.com
Unlike most books on this topic, Donal grounds his recommendations in the context of modern B2B sales, where customers - armed with massive amounts of information and advice - can afford to engage salespeople later and later in the purchase decision. In this world, an insight-based approach must serve as the backbone of a powerful Account Plan. And, as Donal demonstrates, there are no shortcuts to getting this right. This book is required reading for those of us who want to keep selling and avoid the trap of order-taking. Matthew Dixon, Executive Director Sales Service Practice, CEB and co-author of The Challenger Sale
Even a dyslexic, A.D.D., former CEO like me found it to be a compelling relevant read - Love the statistical back up - Practical and relevant - I've turned around over a dozen sales teams in my career and the content provided in this book is the basis for that success. Daly nailed it! Ken Bado, former CEO, Marklogic and EVP, Autodesk
A must-read for all sales professionals working in a salesforce.com environment! Account Planning is a core sales skill that requires a disciplined approach and

ongoing care and maintenance. The book not only teaches the 'how,' but 'why' proper Account Planning will drive bigger and stronger sales opportunities. Matthew L. Cox, Senior Director, Sales Strategy and Operations, Hewlett-Packard All too often Account Planning is a once-a-year effort that gathers dust on the shelf. Use Donal Daly's ACCOUNT PLANNING in SALESFORCE to help transform this critical activity into a usable, customer-centric approach to growing loyal relationships all year long. Bob Thompson, Founder / CEO, CustomerThink Corp. Donal's unique combination of methodology expertise and smart software comes to life in this book. It is filled with priceless nuggets. If you want to operationalize Account Planning, this is the best roadmap I've seen. I encourage all sales professionals to follow it. Carol Burch, former Global SVP, CRM Clear Vision Program, SAP A practical guide that embraces the modern world of global Account Management with a refreshing balance of integrity, knowledge, expertise, and humor. Daly's business acumen is evident as he clearly articulates what it takes to maximize revenue from Large Accounts. A must read and, dare I say it, an enjoyable read. Padma Rao, Director Sales Enablement, Akamai --Testimonials to authorAbout the AuthorDONAL DALY continues to revolutionize the sales effectiveness industry by introducing smart sales performance apps. A serial entrepreneur, he is currently Chairman of The TAS group - the world leader in sales performance evaluation. Donal is an in-demand speaker and writer, and is the author of four books.