

How Five Leading Technology Companies Power Up Their Account Plans

Top performing companies are discovering the huge impact of strategic account planning technology on their ability to prioritize sales efforts, uncover new revenue opportunities, and drive executable plans for maximizing growth and penetration. So, how do they get started in revamping their existing process?

It's simpler than you might think. SAS Institute conducted a pilot workshop using account planning technology on just 17 accounts, and identified \$1M in pipeline in just two days. Other world-class technology companies like Oracle, Blackline, JDA and ACI Worldwide are **among the industry leaders** who are applying best-in-class account planning technology to strategically grow their most profitable customers.

ONE ORACLE®

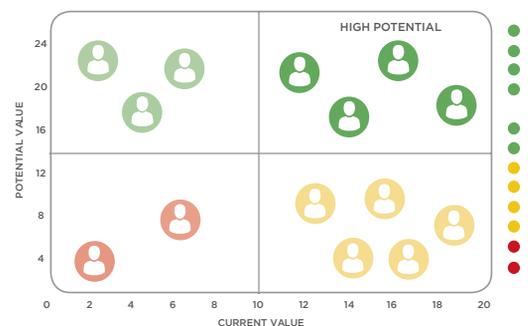
Segment Your Customer Base

The first step in any account planning process is to take a detailed look at your customer base and understand which accounts are ripe for growth, and which aren't worth wasting valuable sales resources on. **According to SAMA**, a whopping 82 percent of companies are still segmenting their customers by historical revenue figures, calling the top five percent of these accounts strategic. This isn't a modern approach to strategic account planning; in fact, it's not very strategic at all.

World-class account teams at companies like Oracle took a much more holistic approach – looking at historical revenue as only a small piece of the pie. Their segmentation process incorporates items like future growth potential, customer lifetime value, degree of organizational penetration, strategic fit, market leadership and more.

Customers that rate highly in those categories will sit at the higher end of the “potential value” spectrum and are prioritized for up-sell and cross-sell sales strategies.

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TWO **BLACKLINE**

Prioritize Key Accounts

According to SiriusDecisions, a global B2B research firm focused on sales strategy, a critical component of a great account plan is charting the product landscape in the account by listing the closed, active and potential opportunities for each buying center, and assessing the current state of other suppliers or installed solutions.

Blackline Systems, a \$100M financial technology provider, followed a 3-step process to uncover white space across lines of business for their solutions at their highest priority accounts for targeted, strategic sales execution. **In just three quarters, they doubled key account revenue.**

1. Prioritized and segmented accounts by relationship strength, current penetration, and future potential and value
2. Built a blueprint for top strategic accounts using account planning technology to visually map out white space, stakeholder influence, business initiatives, and potential opportunities
3. Leveraged automated account plans to facilitate collaboration with the customer and uncover expansion opportunities across the Blackline solution suite for multiple departments and lines of business



BlackLine's key account growth is a prime example of a company that took the time to identify and prioritize its key accounts, resulting in immediate, substantial revenue.

THREE **SAS**

Apply Visualization Technology

Identifying the right accounts is only half the battle. For top-performing sales teams it's about implementing the right technology to gain meaningful visibility into complex strategic accounts.

SAS Institute relied on a manual, paper-based process that left them with a reactive, rearview mirror perspective, using past performance as a baseline for revenue potential and forecasting. They implemented **visual selling technology** that helped them quickly and easily identify the key players in each account, see any gaps in their relationships and take action to fill those gaps. This ensures that relationship management is an integral piece of every sales rep's day. **This resulted in \$20M uncovered in new pipeline, across just 17 key accounts prioritized from planning efforts.**



FOUR **jda.**

Standardize the Account Planning Process

For companies with a large sales force like JDA Software, implementing and enforcing a standardized account planning process is a monumental task. As the company grew through acquisitions over just a couple of years, the solution portfolio and mix of sales teams and strategies became exponentially more complex, and their previous method of doing account planning in PPT once a year meant they were finding out about opportunities within accounts later and later into the buying cycle.



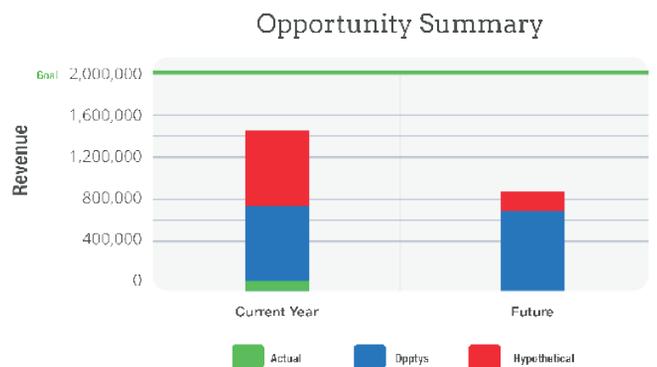
Realigning their account engagement model with technology changed the game, providing a visual roadmap of high-value growth opportunities and a best practices process for aligning sales activities with the goals and priorities of their customers. This enables account managers to anticipate customer needs and map their solutions to the KPIs and metrics that key influencers and decision makers care about. It also included the customer as a part of the process, driving JDA to be an essential advisor rather than just a vendor. **Now, their customers call them to ask about solutions rather than reps having to chase deals long after the evaluation process has started.**

FIVE **ACI UNIVERSAL PAYMENTS.**

Focus on Forecast Visibility

Many companies struggle with accurate forecasting, but aren't taking the opportunity to use their most repeatable, profitable accounts to drive better predictability. For companies like ACI Worldwide, who lacked a consistent strategic account planning process and methodology, it was impossible to achieve long-term revenue visibility with multiple reps calling into the same accounts and little visibility or transparency across the broader team.

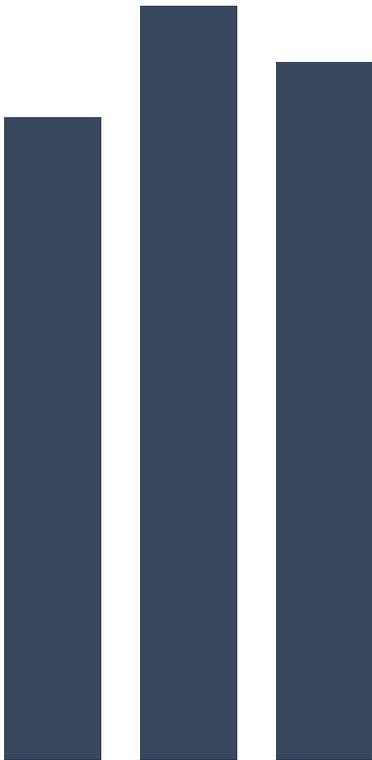
By adopting account planning technology to drive consistent planning, reporting and collaboration, **ACI was able to move from a 3-month to a 3-year forecast horizon by mapping out the white space and revenue potential of their top accounts, which contribute to a majority of overall profits.**



Fiscal Year End	12/31/2015		
Current Year Actual Spend	25,000		
Current Year Opptys	850,000	Future Year Opptys	770,000
Current Year Hypothetical	600,000	Future Year Hypothetical	300,000
Current Year Total	1,475,000	Future Year Total	1,070,000
Current Year Revenue Goal	2,000,000		
Current Year Revenue Gap	525,000		

Results

By following these five steps, companies with previously disjointed, inconsistent account planning strategies improved their growth and penetration significantly. Here are the tangible results:



Oracle

- ✓ Increased win ratios
- ✓ Produced incremental revenue
- ✓ Reduced loss rate

2^x

BlackLine

- ✓ Doubled key account revenue in three quarters



SAS Institute

- ✓ Added \$20M in pipeline with just two initial pilot programs alone
- ✓ Identified \$1M in opportunities in two days with account planning technology
- ✓ Increased deal velocity and penetration of SAS solutions within key accounts



JDA

- ✓ Improved sales forecast accuracy and predictability from one quarter to nearly five years



ACI Worldwide

- ✓ Increased forecast horizon from 3 months to over 3 years

See how you can drive the same results as these top-performers and [schedule a demo](#) ↗ .