



# Grow Revenue in Key Accounts – Getting Started Instructions

## Introduction

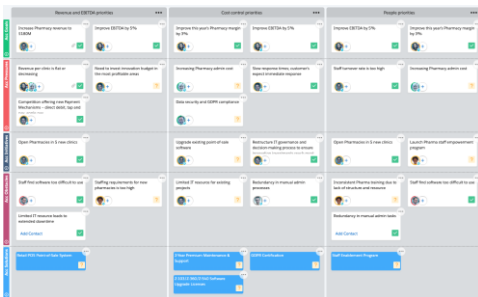
Everything starts with your customers. It always has – and that’s how it should be. But never before has the customer been under so much pressure, or so impatient. The business and personal productivity tools on their smartphones inform the mindset of digital business leaders, and they operate in a fast-moving attention-deficit economy. Wasting their time trying to sell them something they don’t want or need is the worst crime you can perpetrate against your customer.

But customers need help. As the world increases in complexity, customers struggle to prioritize their growing list of business pressures. The imperative to make decisions and act quickly creates tremendous anxiety. There is extraordinary opportunity for the customer-first account team who seeks above all to solve the customer’s problem, understanding that the impact on a customer of a poor buying decision is usually greater than the impact on an account team of a lost deal. Winning account teams who adopt this approach rise to the top in the ever-growing and changing economy.

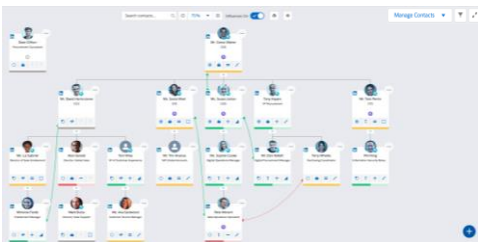
We know *bad things that happen* in large accounts are measured in *BIG* dollars. This is because you’re engaged with a customer in a long game play. The aperture of the lens is open wider as you try to focus on a long-term vision with your customer. You must be careful not to forget why the customer bought from you in the first place, and you must deliver on the promises that you made. Customers expect significant impact on their business from their engagement with your company. Multiple stakeholders are involved in a structured buying process that extends over many months or years as you collaboratively develop a common vision for their success. A strategic approach is essential, and your execution must be flawless if you are to achieve the revenue growth to which you aspire.

Your organization has invested in Altify methods and tools to help you craft an integrated approach to understand your customer’s business, elevate and expand relationships, and create, measure and communicate customer success. During your learning program, you’ll begin to implement an integrated framework for you and your account team to build pipeline and close revenue in your accounts, all within the CRM system you live in every day.

The instructions below will help you get started in using the Spark software to build an account plan for a key strategic account. We will start with two foundational portions of the account plan focused on Insight and Relationships.



Insight helps you to focus on what is relevant for the customer. You will be building an Insight Map which allows you to lay out the customer’s goals, pressures, initiatives and obstacles facing the key players within your account. It is a graphical representation of your customer’s business challenges and helps you and your team see how you link those challenges to the key players in the organization.



Relationships focus on helping you to understand the key influencers in the customer’s organization associated to your account. You will be building a Relationship Map that represents a profile of everyone playing a role within the customer’s organization so that you can more effectively navigate the political waters within.

## Let's Get Started

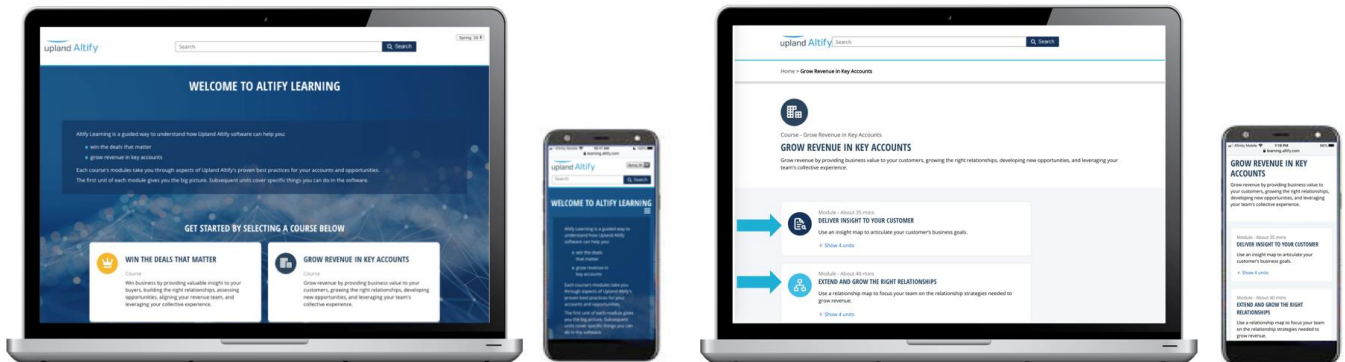
The five steps outlined below will help you prepare for the interactive “Grow Revenue in Key Accounts” Workshop.

1. Read two online modules
2. Together with your manager, pick a key account that you will focus on during the workshop
3. Go into Salesforce and click the “Accounts” tab
4. Click on the “Spark” tab within the account you have selected
5. The second row down under the Spark tab will show the Spark Account Summary launchpad
6. Start a Relationship Map for your account together with one or two of your team members (Click “Go to Relationships”)
7. Start an Insight Map for your account together with one or two of your team members (Click “Go to Insights”)

The following sections will give you step-by-step instructions on how to complete these steps.

## Step 1: Read Two Online Modules

- ❑ Read two **Grow Revenue in Key Accounts** online modules from your computer or any mobile device; 1) “Deliver Insight to Your Customer” and 2) “Extend and Grow the Right Relationships”. These are short modules where you will see how an account executive uses an Insight Map to deliver insight to her buyer, and a Relationship Map to focus her team on the relationship strategies needed to expand their presence within their account. You’ll access these two Altify Learning modules at [learning.altify.com](http://learning.altify.com).



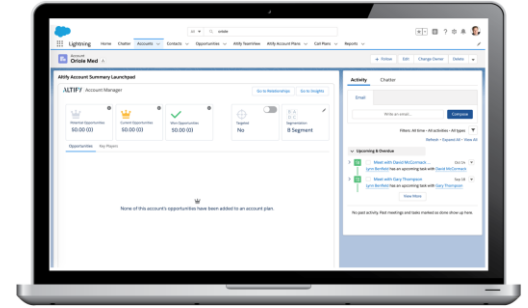
- ❑ After completing the online modules, consider all you know about the account. For example, do you know the goals and pressures of the key players you’ve identified? Bottom line: having a solid understanding of the current state of your account will make for a more rewarding workshop, and help you gain a stronger position with your account’s organization.

## Step 2: Select a Key Account

- ❑ Together with you manager, **select a key account** in your Salesforce CRM that you will focus on for the workshop.

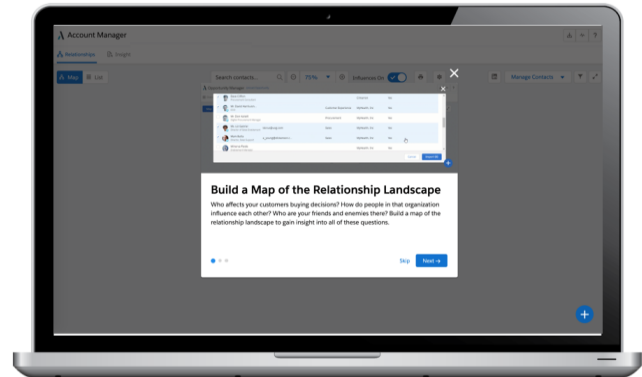
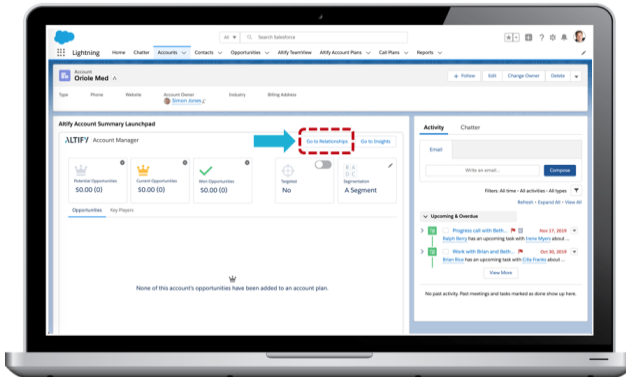
## Step 3: Confirm Access to the Spark Account Summary Launchpad

- Once you select your account in Salesforce, **locate the Spark Account Summary Launchpad** in the account record. If the Spark Account Summary launchpad is not visible, please contact your manager and Com Ops team so they can resolve your Spark access prior to your workshop.
- A best practice once you have selected your account is to ensure that you have all the contacts associated to the account in Salesforce. Please check that your contact records include names, their titles, and who they report to. This will make building the Relationship Map and Insight Map easier when you take those steps.

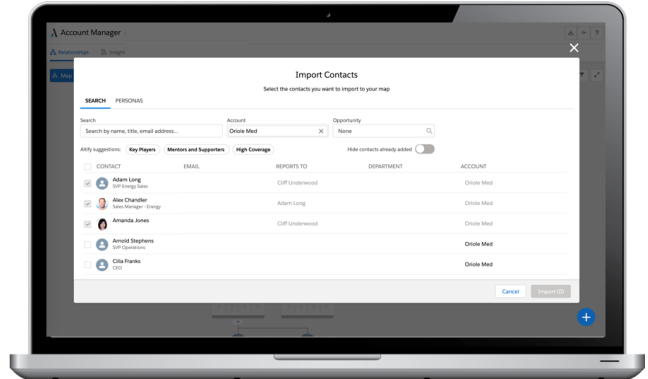
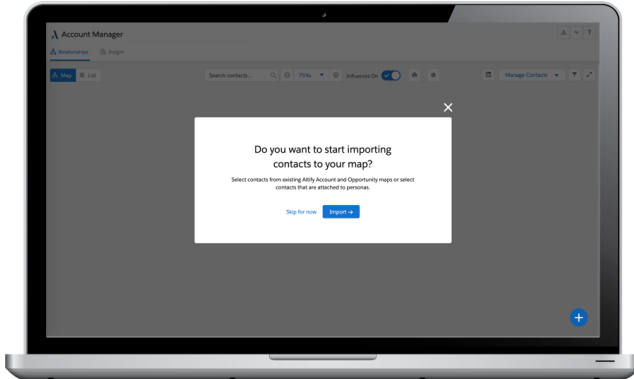


## Step 4: Start a Relationship Map for Your Account

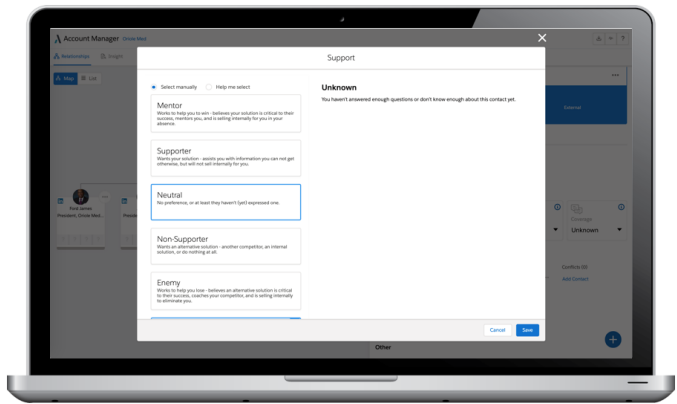
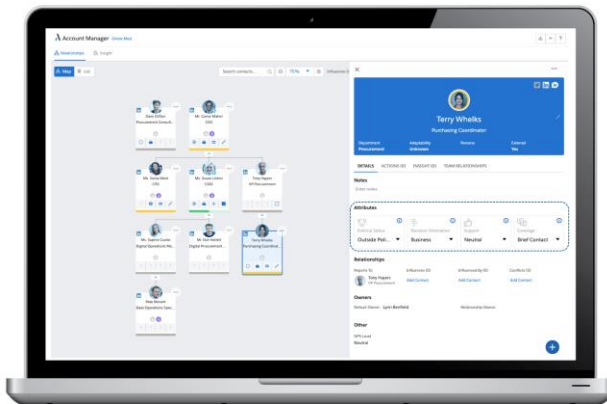
- Click the **Go to Relationships** button to start your Relationship Map for your account. Work with your account team to describe your current relationships. Leverage the Altify Learning module along with Altify’s in-product guidance to help complete the assignment.



- Once you have access, you want to import contacts from your customer’s organization onto the Relationship Map. These would be individuals who are key influencers within their own organization. You want to focus on those individuals who are instrumental when deciding which strategic providers (vendors) they will invest with. These key influencers form strategic relationships with providers to help them achieve their own business and personal goals and initiatives. On the Import screen, you will see all the contacts you have in your CRM Salesforce for this account. Click on all the names you want to add to your Relationship Map. Click “Import” and they will appear on your map – with their names, titles and the formal reporting relationship (who reports to whom) if you have entered that into your Salesforce contact record.



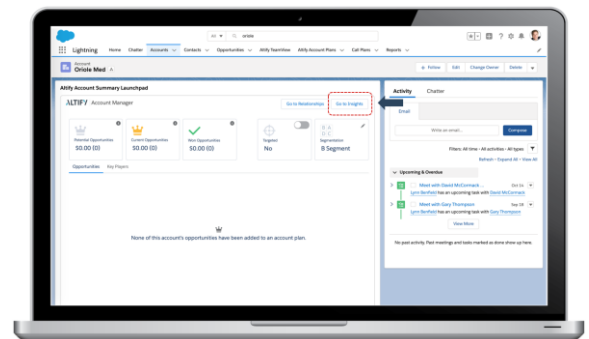
- Once you have your contacts on your Relationship Map, you want to complete the Attributes for each individual. Click on the individual on your Relationship Map and the contact’s details will appear on the right side of the Relationship Map. Click on each Attribute as shown and then you can choose the appropriate answer from the list provided. Continue to add individuals to your Relationship Map as you uncover more information.



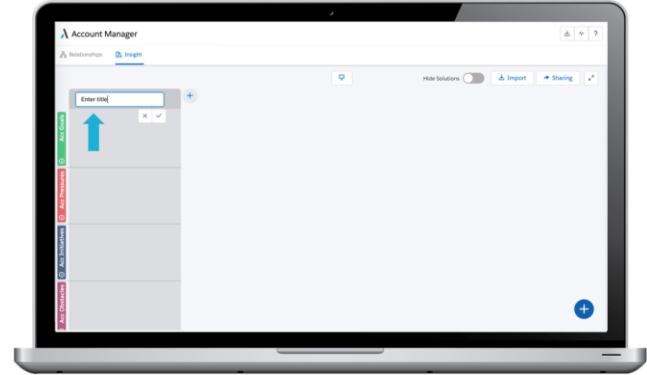
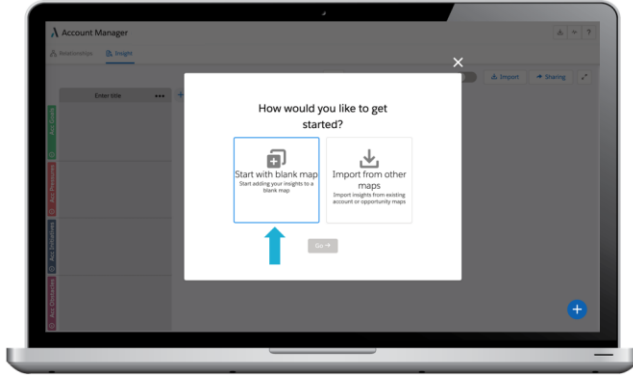
- When starting to build a Relationship Map for the first time, it is understandable that you might not know all the attributes for each individual. Do not guess. “Unknown” at the beginning are acceptable. It might require you to spend more time with your customer to understand more about the key players in the customer organization.

## Step 5: Start an Insight Map for Your Account

- To start your Insight Map**, click on the “Go to Insights” button from the Spark Account Summary Launchpad. Work with your team to describe the customer’s current and desired state. Based on what you know, capture the executive key players goal(s) for the organization, the business pressures affecting those goal(s), the initiatives they have put in place to address those pressures and the obstacles key players need to overcome to insure their initiatives are successful. Leverage the Altify Learning module along with Altify’s in-product guidance and to help complete the assignment.



- When you create an Insight Map for the first time, you have options on how you start it. For the purpose of this exercise, you will start with a blank map, select that option and enter a title for your map.



- To build an Insight Map, you can either start at the top by documenting the executive's goal(s) or at the bottom documenting the initiative(s) or obstacle(s) that you have uncovered. It makes no difference where you start. The key is to get the information into your Insight Map. You enter each component of the Insight Map in the same manner.
- Once you have entered information and added your card, a pop-up window on the right side of the Insight Map screen is available. In this window, you can provide a more detailed description of the component to help you craft the customer story. Additionally, you can indicate who from the customer organization is responsible or involved and attach supporting documents as needed.
- Continue to build out each component of your Insight Map in the same manner; namely goals, pressures, initiatives, and obstacles. When you start to build an Insight Map for the first time, it is acceptable to start with assumptions of what you think are some of their challenges or issues. It is also understandable that you might not know who is responsible or involved from the customer organization. Both of these conditions require you to spend more time with your customer to uncover the information you are missing.

