



Work with a list of accounts: Introducing the Athena accounts module

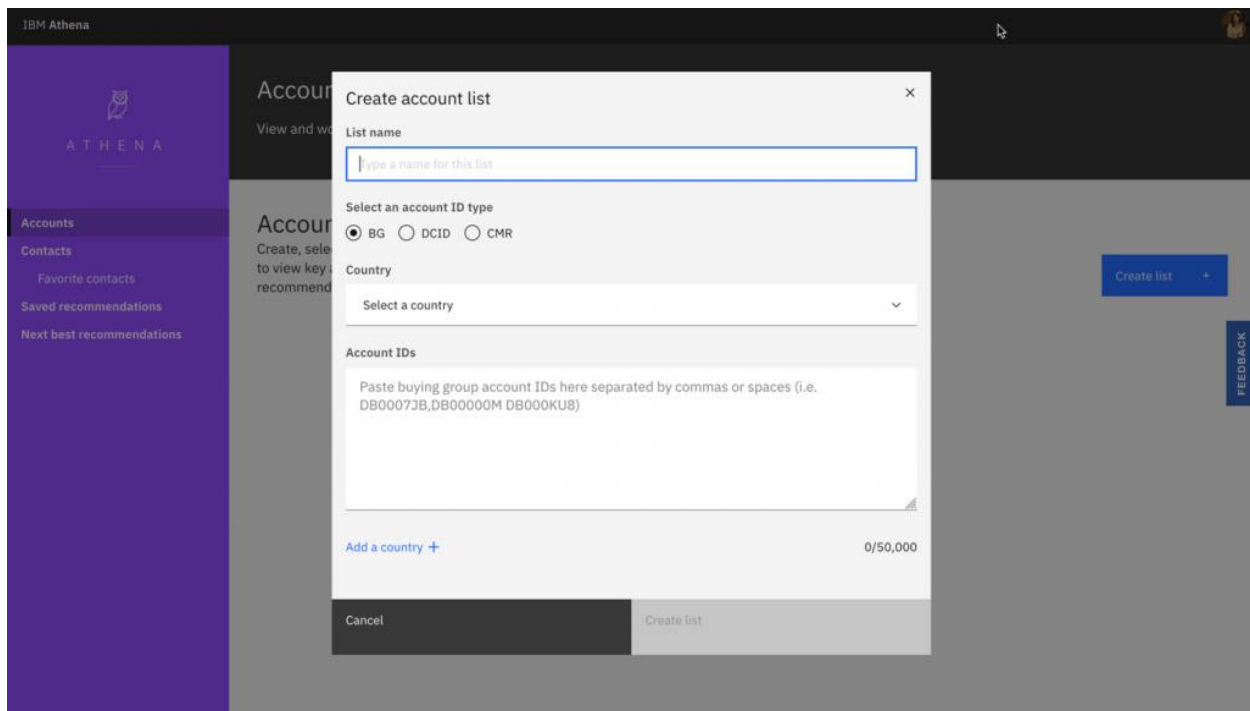
By: Haley Kitts August 28, 2020 [Athena](#), [General](#)

Building on the contacts, alerts, and recommendations capabilities previously delivered, Athena now enables you to work with a list of accounts. Simply add an account list at the Buying Group (BG), Domestic Client ID (DCID), or Customer Master Record (CMR) level, and you'll immediately have key account details, as well as relevant sales play recommendations, at your fingertips. In addition to the new accounts-module, this release includes some design enhancements to save you time.

Add a list of accounts

Visit ibm.biz/IBMAthena and use the left navigation menu to access the new Accounts page, where you can add a list of accounts. (In this initial release, Athena supports a single list.). Paste up to 50k accounts, within your supported Market, at the BG, DCID, or CMR level.

- **Get insight about these accounts:** Athena presents your account list with key details such as account name, ID, country, IBM revenue, last purchase, and client health. [*Coming soon: Net Promoter Score (NPS)*]
- **Leverage sales play recommendations to start new conversations:** If you have an assigned territory, Athena already delivers sales play recommendations for accounts in your territory. However, this new feature enables *all* users to access recommendations and account details for a targeted list of accounts. Territory owning sellers, you can add an account list to focus on a segment of your territory. Use the *Feedback* link on any Athena page to let us know what you think of the recommendations you receive!
- **Get email alerts identifying your top 3 recommended sales plays:** Not only will you see a list of recommendations in Athena, Athena delivers your top 3 sales play recommendations in a weekly email. (Territory owning sellers, you'll continue to receive these email alerts for the accounts in your territory, even if you add an account list.) [Manage your alerts preferences](#).
- **Download your account list:** Prefer spreadsheets? No problem, you can download your list, anytime, or delete it and add a new one.



How does this differ from uploading a client list in CSA?

- Whereas Athena enables you to work with up to 50k accounts at the BG, DCID, or CMR level, CSA supports uploading only 15k CMRs.
- You'll get your recommendations in Athena immediately. It can take up to 8 hours for your recommendations to appear in CSA.

Quickly identify a client contact

The Athena recommendation details now show the primary contact associated with the opportunities that are influencing the recommendation. Click on this contact's name to see information about the contact, including a detailed timeline of contact initiated marketing interactions.

Click to copy a contact's email address

Clicking on an email address conveniently copies that address to your clipboard. No need to highlight the email address, or deal with email apps popping up if you inadvertently click on an address.

Understand how to manage your alert email preferences

You spoke, we listened! Your Weekly Alert Digest email now includes a link to guidance for managing your alert preferences. You can specify which alerts you'd like to receive, or opt out of alert emails.

Coming soon

- Work with your territory account list
- Net Promoter Score (NPS) for your accounts

Learn more

[Visit the Accounts knowledge base article](#)