

9 Keys to Account Planning that Actually Works

Don't wing the account planning process. Follow these expert tips to design a successful account planning program in your organization.



THE WHY

An effective account plan is a roadmap for success.

1 Start with Why

Before you begin, find your why and connect it to your account planning. When you know what's in it for you - why you're building an account plan - you'll find the passion that will help you succeed.

2 Be Committed – Not Just Compliant

Don't just create an account plan because you have to. Remember your why and commit to working your plan. It will help you close more deals, get more renewals and be a strategic partner for your customer.

3 Prep to Be Productive vs. Busy

Building a plan beforehand allows you to accelerate quicker down the road. A well thought out account plan maps out the steps to your goal, using resources from varied people, places and tools.

THE PROCESS

A successful plan begins with a strong account planning process.

4 Make Planning an Organizational Discipline

Account planning takes you further when it moves from an individual task to an organizational process. Enlist cross-functional participation and develop a cadence for planning, reviewing and measuring actions.

5 Create a “WE” Plan vs. an “I” Plan

Involve all key individuals - including leadership and strategic partners – in the creation of the account plan to ensure everyone is aligned. Full team involvement brings valuable perspective and expertise.

6 Make Account Planning a Habit

Embed account planning into your routine. Account plans are living documents that require continual iterations. Data and insights from sales intelligence tools can simplify the process and keep plans top of mind.

THE PLAN

A compelling plan is purposeful, dynamic and cross-functional.

7 Build Plans with Empathy & Understanding

A successful account plan communicates empathy and builds trust. Develop a deep understanding of your customers, and include that knowledge to open the gateway to influence.

8 Incorporate Strategic Initiatives

Focus your plan on where your customer wants to go and what challenges they're facing. Knowing their strategic initiatives will help you show exactly how your solution can help them.

9 Leverage Reliable & Trusted Sales Intelligence

Use intelligence to build a plan that shows how you'll partner with a customer, not just what you're selling. The right tools can provide trustworthy data that's relevant and tailored to your use case.

Databook Client Testimonial

"An Easy Button" for Account Planning

"You have to have a tool like Databook in order to empower your team with trusted and reliable information. There's a lot of things that you can buy that provide data to teams, but it has to be something that they feel confident in using.

I'm with Databook – it's a treasure trove of information. We use all the different assets and different pieces, like the transcripts from earning calls, curated news articles that are relevant to our business... prospecting intelligence, propensity to buy indicators...industry benchmarks... industry trends. Incorporating all that into our account plan has been immensely effective for us.



It really makes creating the account plan an easy button, because they have a feature that's effectively a downloadable POV. You click a button, it downloads all of the information that you would have from your account plan into a deck that's in your custom corporate brand. It's really the easy button for the A.E., because all the information that they would have to take hours, days to find is literally in one platform."

— Kevin Jordan, Director of Sales Performance, Databricks

9 Keys to Account Planning that Actually Works is a summary of the 2022 webinar "Don't 'Check the Box' - 5 Ways to Design Account Planning that Actually Works," hosted by [Databook](#) and [Emissary](#).

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