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The Strategic Account Plan

Presented by SalesBoost

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How to complete The Relationship Map
and strategic account plan

How to hold yourself and your team accountable for your account management plan:
Set a meeting with your team or leadership to review your Objectives/Strategy/Tactics plan and update the group on the progress. This could be a good time to re-evaluate your goals and revise them if needed.

You decide with your team the best way your Objectives/Strategy/Tactics plan should be evaluated.

- Is it the number of new meetings booked?
- Is it a specific revenue number?
- Is it an increased number of RFPs?

Goals for meeting with your client:
Set a meeting with your client to check in and make sure you are still meeting the expectations of your agreed upon goals.

The goal of holding formal account management meetings is to ensure there are no hidden objections that keep you and the client from working together.

Account meetings take preparation and it is worth it when you reap the rewards!

Existing Account:

- Organizational changes
- Client role and potential or future changes
- Understand shortfalls from the previous year
- Uncover unmet expectations
- Positive partnership results
- How to work better together

Target Account

- Understand their meeting program for the current and future year/s
- Understand when hotel selection fits into their planning process
- Who are the key players?
- What are their major hot buttons?
- What do they need in a hotel partner?

Now complete your strategic account plan
Now you know the value of the account and you know where the client wants to take the relationship, it's time to strategize.

Use OBJECTIVE/ STRATEGY/ TACTIC worksheet to outline the objectives you want to achieve, the strategies you will use, and the tactics to help you get there.

The STAKEHOLDER MAP will help you understand: Who you know, who you need to know, where they stand in the decision-making process, and if you need to schedule any further meetings.

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Account Plan
Objectives/Strategies/Tactics

Account Name:

Objectives: *What are you trying to accomplish? Win more share? New business account? More opportunities from a current account? List those objectives here.*

Strategy: *Plan of action? (e.s.: Get regional offices to influence national offices.)*

Tactic: *How to carry out the strategy. (e.s.: Book local holiday event, smaller training meetings, invite them to lunch, etc.) List your tactics below:*

Strategy 1:

Tactic 1:

Strategy 2:

Tactic 2:

Strategy 3:

Tactic 3:

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Relationship Map

Stakeholders	Pain, Priority, Motivation	Notes:
Name: Title: *circle one* Approver Decision Maker Influencer	P: P: M:	1. Who on the team has a connection to the client? : 2. Overall plan to make contact: 3. History: 4. Who should reach out:
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