

IT Solutions Provider



Strategic Account Management Processes Lead to Better Business Decisions

Developing enterprise-wide solutions for networking and telecommunications-dependent clients is the absolute focus for this premier provider of customized IT solutions. Although well versed and very efficient in the art of contact, quote, and order management, the sales team was looking for a better way to properly identify customer pains and proactively capture service opportunities. Additionally, the group wanted an effective and intuitive process to promote open communication among team members and senior management.



“Our sales force is using a clear and strategic process to analyze opportunities and accounts. More importantly, they are better able to engage senior management at the right time with the right information.”

- Vice President of Sales

Account teams apply streamlined analysis workflows to assess account status. Using an actual customer account as a foundation, Critical Path Strategies (CPS) facilitated a two-day workshop to demonstrate the power of various process-driven account management tools. These tools are designed to formalize account analysis and help account managers assess the true state of customer and prospect relationships and set the groundwork for determining immediate and long-term sales opportunities.

The account managers were introduced to several processes, including organizational mapping, customer value alignment, gap assessments, and an activity footprint. These practical tools enable the account teams to balance customers' needs with the company's strengths, identify key players within each account, and develop relationship-building strategies. The footprint process provides a straightforward method of sharing successes, lessons learned, and opportunities with the team and senior management.

“CPS provided a framework to help us better understand our customers, their needs and our strengths,” said a senior account executive. “It’s the groundwork from which we can identify the sales opportunities that align with our competencies, as well as the benefits we bring to our customers.”

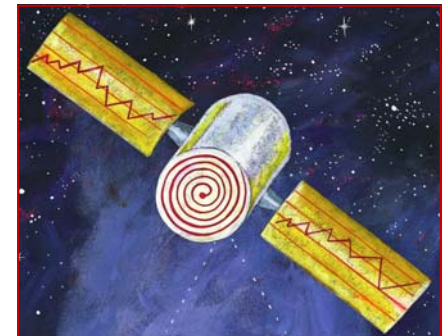
CPS tools become standard operating procedure. The account teams have embraced many of the processes and are using them to size up customer and prospect relationships and



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establish aggressive, yet attainable, goals. Instead of being in a reactionary mode, team members can take a more proactive approach when determining customer requirements, allowing them to develop stronger value-based solutions.

More importantly, the CPS tools have become a key component of the company's culture and management discipline. The management team reviews the status of major opportunities using five CPS tools as the basis for the opportunity discussion. In addition, team members provide the vice president of sales with detailed call plans prior to appointments for which he is scheduled to attend.



The sales organization completes activity footprints each week to outline goals and keep track of accomplishments. This not only provides timely, standardized communication among team members, but allows senior management to leverage opportunities to assist in the sales cycle.

Team members achieve extraordinary milestones. Only six months after first engaging CPS for the selling organization development project, account teams are experiencing terrific success. One team member has achieved *165 percent* of her annual quota and anticipates that by the end of their fiscal year, she will reach *200 percent*. The management team is so excited by the results that they have rolled out the CPS process and tools to other related departments to develop extraordinary goals and actionable project plans to support a variety of customer-related projects.

“When using these processes, what you know and what you *don't* know about an account becomes clear,” said the vice president of sales. “You can set realistic goals, and make well-informed business decisions about both low- and high-risk opportunities. CPS has helped us better structure the way we analyze deals and communicate results.”

For more information about this client, contact CPS Client Services at clientservices@cpstrategy.com.

ABOUT CPS. Critical Path Strategies helps clients improve their competitive position by providing comprehensive consulting services to improve the effectiveness of major account sales organizations. Our portfolio of services addresses the strategic, organizational, and relationship issues that impact selling performance. Engineering successful sales teams the Critical Path Way enables clients to develop strong selling organizations, build high-value customer relationships, and accomplish strategic business initiatives. Our clients—emerging companies and members of the Fortune 500 alike—typically measure 100 to 500 times their CPS investment in revenue growth.

