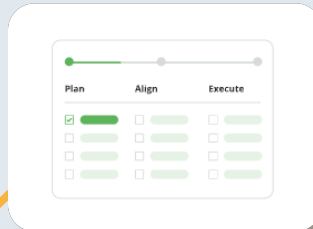
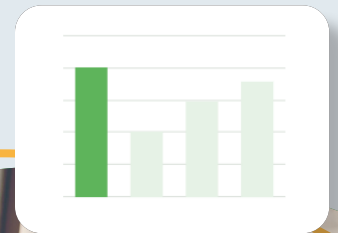




Driving Success

A Guide for Account-Based Sales in 2023



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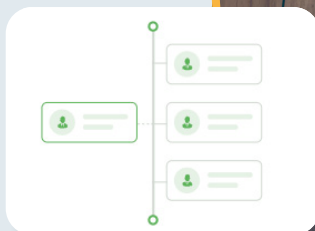


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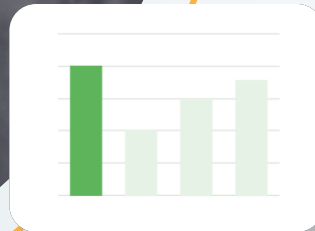
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Introduction

In today's rapidly evolving business landscape, **account-based sales (ABS) has become a critical strategy for organizations aiming to achieve sustainable growth and success.** Key accounts offer not only significant current business but also untapped potential within other buying centers, lines of business, or geographic locations. However, many organizations struggle to effectively penetrate key accounts and unleash their full growth potential.

Becoming a strategic partner is the key to unlocking transformative growth opportunities within key accounts. By emphasizing joint planning, collaboration, and a strategic focus on client business goals and objectives, organizations can position themselves as trusted partners and create virtually unlimited growth over the medium to long term.

Despite the emphasis on ABS, many B2B organizations find themselves running faster just to stay in the same place with their key accounts. The question arises: **Why are so many B2Bs missing out on the transformative growth opportunities within their key accounts, despite having CRM systems, methodologies, and highly paid ABS teams in place?**

This comprehensive guide addresses that question and provides actionable insights to drive success in account-based sales. By implementing the right strategies, leveraging technology, and adopting a customer-centric approach, you can elevate your key account management to new heights and unlock unparalleled growth opportunities.

SECTION ONE

What is Hampering Your Key Account Growth?

Key accounts are challenging to win and can be equally as challenging to grow. However, these accounts provide significant current business, and have untold potential within other buying centers, lines of business, or geographic locations.

Enticing as the potential might be, many organizations find that further penetrating key accounts in a strategic, successful way can be easier said than done. **But with the right people, strategic insights, and technology, account-based sales can create unlimited growth over the medium to long term.**

Large enterprises – your key accounts – are transforming rapidly to keep pace with the added complexities of globalization and digitization of the business ecosystem. While these organizations hold the promise of exponential growth and profitability for vendors, they offer that opportunity only to those that they view as “strategic partners.” In other words, opportunities only go to vendors they see as being able to help them grow.

Unfortunately, most B2B organizations struggle to retain key accounts, let alone identify how to help them drive growth. Despite all the emphasis on account-based plays, companies find themselves running faster and faster just to stay in the same place with key accounts.

The good news is that it's not impossible. You can become a strategic partner by emphasizing joint planning, collaboration, and a focus on client business goals and objectives.

What changes could put your key account sales program on the path to growth and expansion?



Even with all the CRM systems, methodologies, and highly paid Account-Based Sales (ABS) teams in place, why are so many B2Bs missing the transformative growth opportunities within their key accounts? ”

SECTION TWO

Driving Growth: The Journey from Vendor to Strategic Partner

To drive growth and establish strategic partnerships with your key accounts, you need an integrated Account-Based Sales Execution Platform. In this section, we will delve into the characteristics of a best-in-class platform and how it can empower your account managers to determine the optimal path to revenue within an account. We will discuss the importance of global collaboration, strategic execution frameworks, and shared exercises with clients to gain buy-in.

A purpose-built account-based platform should provide clarity and actionable insight into critical elements such as organizational structures, stakeholder relationships, and white space in key accounts. With a specialized account-based platform, your team's productivity can improve. We will explore how automation, centralized data and analytics, and visualizing customer data can enhance productivity and drive results.

Unlocking the Potential of Your Account-Based Sales: The Power of an Integrated Platform

First, you must consider suitable investments to enable your ABS teams to drive revenue (uncovering and winning immediate business) and long-term strategic partnerships (creating value to help customers grow). In addition, it is crucial to put the right technology in place to operationalize the program and drive collaboration.

A sales execution platform helps drive your ABS program by bringing critical account-level components together and giving key account teams the level of insight, consistency, and cus-

tomers focus that your clients undoubtedly expect from their strategic partners. It should be a purpose-built platform that enables a strategic approach by transforming your program from a tactical, internal, task-driven process into an intelligent, evergreen discipline focused on customer alignment and revenue growth.

So, what are the characteristics of a best-in-class ABS Execution Platform? Let's explore:

- » **Empowering Account Managers:**
Your platform should equip account managers with the intelligence needed to navigate the complex path to revenue within each account. It's about arming them with the right information and guidance to make informed decisions and seize opportunities.
- » **Driving Global Collaboration:**
Collaboration is key to ABS success. A powerful platform acts as a hub, providing a single source of insight into each customer. This fosters seamless collaboration across global teams, ensuring everyone is on the same page and working together towards shared goals.
- » **Applying a Strategic Execution Framework:** Transforming your ABS program from a mere checklist of tasks into an intelligent, evergreen discipline requires a strategic execution framework. Your platform should operationalize best practices, keeping account managers laser-focused on delivering value and driving revenue growth.

- » **Engaging the Client:** Account planning should be a shared exercise involving your clients. Your platform should facilitate collaboration and buy-in, allowing you to co-create strategies and align objectives with your customers. Together, you'll forge stronger partnerships and achieve mutual success.
- » **Providing Insights and Metrics:** Your ABS Execution Platform should offer sales teams and management a comprehensive perspective into the success of account plans, strategies, and key performance indicators. With actionable insights at your fingertips, you can make data-driven decisions and course corrections when needed.

- » **Focusing on Mutual Growth:** It's not just about your company's growth; it's about nurturing mutual growth with your customers. Your platform should foster a customer-centric approach, helping you identify opportunities for shared value creation and long-term partnerships.

Having a specialized account-based platform can **help your team's productivity.**

"It's imperative to work with sales operations to choose the tools that will yield the greatest productivity gains for your organization. Whether it's automating capture of buyer interactions or leveraging revenue operations platforms that centralize data and analytics, truly understanding what's available and zeroing in on what will best serve your team can be a game changer." – Phil Harrell, VP, Group Director, Forrester



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Purpose-built account-based platforms should bring clarity and actionable insight to critical elements like organizational structures, stakeholder relationships, and white space in key accounts.”

SECTION THREE

Getting Started

Implementing an ABS program requires careful consideration of your organization's unique needs and goals. Whether you are just starting to build your ABS program, leveraging a proprietary ABS method or process, or using CRM for ABS, we will provide insights and solutions to align your program with best practices. We will discuss the must-have features and functionality of an account planning and execution platform, ensuring it can represent data and insights into the account landscape, support your processes, and integrate with your CRM.

Evaluating the right account-based platform vendor is crucial for success. In this section, we will provide a comprehensive list of questions to ask vendors, covering account planning capabilities, process support, available resources, ROI measurement, CRM integration, implementation and onboarding process, account management, successful client examples, and support availability.

The Competitive Advantage of the Right Sales Execution Platform

Unlocking the full potential of your ABS program requires the right sales execution platform. It goes beyond mere technology; it becomes a competitive advantage that showcases your organization's ability to co-create value, collaborate with key accounts, understand strategic goals, and drive growth. With

this platform, your account managers can help customers visualize and execute their strategic roadmaps, paving the way for success.

But here's the catch: Not all platforms are created equal. Your business model, goals, and level of account-based sales maturity play a crucial role in determining the platform that best suits your needs. One size does not fit all. It's essential to choose wisely, considering the unique requirements of your organization.

While many enterprises already have some basic building blocks of key account-based management, assessing their effectiveness is vital.

Ask yourself:

- » Which building blocks are already in place?
- » Do these elements connect seamlessly to form a complete strategic account-based imperative?
- » Are they robust enough to keep up with the speed at which your key accounts and the business ecosystem are evolving?

By critically evaluating your existing foundation and selecting the right platform, you can supercharge your ABS program and stay ahead of the curve. It's time to make strategic decisions, embrace transformation, and propel your organization toward exceptional growth in the dynamic world of account-based sales.



Quick Self-Assessment

The Most Common Scenarios

Which best describes your current approach?	The most important things to consider
<p>You are just starting to build your ABS program.</p> <p>Having realized that key accounts should be treated differently than traditional customers, you're in a great position to build a foundation upon which account managers can cater to the unique complexities of key accounts. But how do you know which processes, frameworks, and technologies best align with your ABS strategy and goals?</p>	<ul style="list-style-type: none">» Seek out a full-service solution with proven best practices, account-based expertise, and best-of-breed technology to deliver repeatable, measurable results.» A vendor should offer a consultative approach vs. a generic, plug-and-play application.» See if the provider includes an adoption journey or roadmap to help scale your program by focusing on the highest impact areas first, with a path to expand as your sales execution matures.
<p>You are leveraging a proprietary ABS method or process.</p> <p>You have acknowledged the benefits of standardized frameworks and procedures, but is your current methodology effective in driving consistency and reinforcing training and best practices?</p>	<ul style="list-style-type: none">» Look for a flexible solution that works with any sales or account management process and can scale as your needs evolve.» The ideal solution will combine elements for both planning and execution to drive a guided operational process.
<p>Your account managers are using CRM for ABS.</p> <p>You invest a lot of money in your CRM. A CRM is an indispensable tool for transactional sales and long-tail accounts, but can it address the complexity and depth of analysis, planning, or governance required to serve your key accounts best?</p>	<ul style="list-style-type: none">» Focus on the solutions in the market designed specifically to manage the unique world of key accounts and integrate well with your CRM to provide a smooth workflow.» Look for solutions that visualize the mountains of customer data buried in the CRM and in people's heads. For example, features that allow you to see and understand the entire landscape of stakeholders, influencers, buying centers, business units, geographies, strategies, and initiatives within your key accounts.

Once you have a realistic assessment of where you are, selecting the most appropriate solution for your needs is more manageable.

Sales Maturity Model: Enhancing Account-Based Sales Planning

After you assess your existing foundation and select the right platform. It's now time to see where you fall on the Sales Maturity Model.

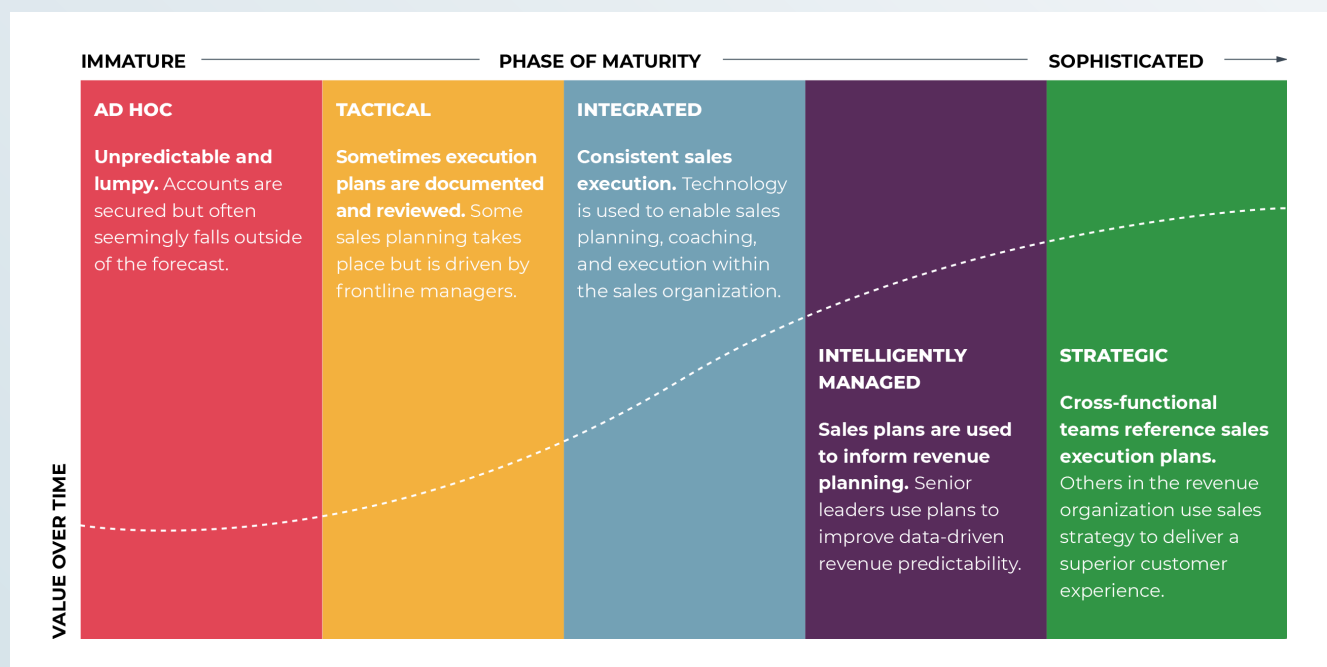
Effective sales planning is vital for organizations to achieve their targets and execute their strategies consistently. A sales plan provides a roadmap, guiding the team from the current state to the desired goals. It fosters understanding, alignment, and collaboration among sales, executive sponsors, marketing, and customer success. This ensures that everyone is working towards the same objectives, enabling successful sales execution.

In account-based sales, where the focus is on targeting specific accounts and building personalized relationships, the Sales Execution Maturity Model plays a crucial role. This model, developed by Revegy, assesses an organization's

sales planning maturity and helps identify areas for improvement in account planning.

The Sales Execution Maturity Model encompasses several stages:

- » **Ad Hoc:** The initial stage with unpredictable sales processes, limited methodologies, and independent sales representatives. Minimal training, ad hoc tool usage, and anecdotal performance metrics lead to challenges in forecasting and revenue growth.
- » **Tactical:** Basic sales processes begin to develop, with some tool adoption. Training efforts start to take shape, but refinement and tailoring of plans to the team may be lacking. Emphasis is placed on individual performance rather than team performance.



- » **Integrated:** Consistent plans and technology usage promote success. Sales and marketing work closely together, leveraging customer data. The focus shifts towards standardized processes, team performance, and data-driven metrics for improved forecasting and revenue growth.
- » **Intelligently Managed:** Continuous improvement and a culture of learning drive success. Collaborative and sophisticated sales processes enhance team alignment. Data-driven decision-making and advanced analytics lead to performance improvements.
- » **Strategic:** The most mature stage, where cross-functional teams integrate sales plans with marketing and customer success. Long-term strategic planning, innovation, and sophisticated, data-driven processes are emphasized. Objective metrics enable accurate forecasting and revenue growth.

The Sales Execution Maturity Model holds particular importance in account-based sales because it aligns account planning efforts with the overall sales strategy. By progressing along the maturity curve, organizations enhance their ability to target and engage specific accounts effectively. The model highlights areas for growth, enabling teams to refine their account planning processes, collaborate across departments, and leverage data-driven insights for better forecasting and revenue generation.

In account-based sales, where personalized approaches are crucial, the Sales Execution Maturity Model provides a framework to elevate account planning practices. By embracing the model, organizations can drive growth, increase revenue, and establish themselves as strategic partners to their target accounts.

Evaluating the Solutions

Must-Have Features & Functionality

Unleashing the power of your account-based sales program hinges on evaluating the right solutions. But beware: not all account-based management offerings are created equal. From essential tactical tools to comprehensive strategic solutions, the market offers a range of options designed to meet various needs.

To make an informed decision, you must prioritize features based on your unique requirements and understand how effectively they function within the solution. Beyond the basics, consider the technology approach, evaluating usability, scalability, and flexibility.

As you navigate the evaluation process, there are three crucial questions to keep in mind:

- » **How does the platform represent data and insights into the account landscape?** Can it capture and visualize the corporate structure, buying centers, stakeholder relationships, goals, competitive landscape, account plans, and total potential? Look for a solution that provides a comprehensive and intuitive representation of your accounts' intricate dynamics.
- » **Does the platform offer custom views for different internal stakeholders?** Imagine role-based dashboards tailored to the needs of CXOs, team leaders, and individual account managers. Each view should provide the most relevant insights and information, empowering stakeholders to make informed decisions.
- » **Can the platform seamlessly integrate with any CRM or methodology?** Flexibility is key in a rapidly evolving sales environment. Ensure that the solution can adapt to your existing CRM or accommodate future changes in your sales methodology, facilitating

a smooth transition and eliminating unnecessary disruptions.

By gaining deep insights into these areas during your evaluation, you'll be able to identify the solutions that align with your long-term objectives and provide sustained value. Prepare to embark on a transformative journey that propels your organization forward, equipped with a robust account planning and execution platform that evolves with you.

Evaluating the Account-Based Platform Vendor: Questions to Ask

As you explore the range of solutions available for your organization, it's crucial to assess how each aligns with your unique Account-Based Sales (ABS) model. Will the chosen solution empower your people and processes to drive desired outcomes such as efficiency, collaboration, visibility, and revenue?

At this stage of the buyers' journey, asking the right questions is paramount. ABS is a complex discipline, and you need more than just another vendor – you need a strategic advisor and partner who understands your specific needs. The last thing you want is a tool that doesn't support your sales process, resulting in unhappy users and abandoned platforms.

To help you make an informed decision, consider the following questions that examine both the solution and the provider, ensuring they meet your strategic needs and goals:

1. What are the primary account planning capabilities offered?

Look for a vendor that goes beyond status quo solutions like CRM and spreadsheets to expose gaps, risks, and hidden opportunities in your current account management approach. Assess how their unique capabilities address these gaps and drive your highest-priority objectives.

The solution provider should provide details on how their tools are configured to meet your unique model.

Ask yourself:

- » Can they extend configurations of tools, such as relationship maps used by different teams or sales plays? For example, if a standard relationship map has four attributes, but you need two additional details for specific deals or regions, is that possible?
- » Can it scale your account plan template up or down based on need? For example, is it possible to have strategic accounts with more extensive, more detailed templates while target accounts at the local or regional level have smaller, more straightforward templates?
- » Can it capture high-level status data on your projects to provide a global, holistic view of delivery performance?
- » Does it organize action plans under each of your goals and objectives?
- » Can it provide a GANTT-type view of your goals, objectives, and actions to reveal where you may have execution or performance risks in your account-based strategy?
- » Does it export plan information into external assets like PowerPoint for distributing and presenting?

2. How will the solution support your processes?

Account planning is just the beginning – ongoing execution is crucial for meaningful impact. Look for a vendor that can align with any sales process or methodology, accommodating changes and evolution.

It may be tempting to purchase a solution with a built-in methodology, but what if it doesn't work with your model? Or what if your compa-



ny undertakes a sales transformation effort that involves implementing a new methodology and process? Sales organizations need a solution that can be tailored and configured to the way they sell, and that can evolve as needs shift.

Ask yourself:

- » Can the vendor list different methodologies they support and provide examples?
- » Can the solution visually represent our ABS process stages and activities?
- » Does the solution offer dynamic functionality that automatically tailors the process based on data like business unit or account type?
- » Can the solution provide visual cues to the end users? For example, management activities are one color, while account manager activities are another.
- » Does the solution support multiple types of reviews (team/peer, manager, business unit, executive) with appropriate processes and content for each?
- » Does the solution permit users to capture comments, recommendations, and next steps in the account plan for performance evaluation and coaching?
- » Does the solution provide specific tools to support coaching (templates, scorecards, process maps, etc.) tailored to our coaching model?
- » Does the solution offer embedded analytics to help track and measure areas like adoption, account planning activity and progress, revenue status, and account health? Can it correlate these outcomes to show how they impact account performance, opportunity creation, revenue growth, customer value, etc.?

3. What other resources for account planning do they have available?

Seek a vendor that not only provides the technology but also offers consultative services, templates, playbooks, onboarding, and adoption recommendations. You want an account planning expert on your side who can help you maximize the value of the solution and navigate the journey successfully. Inquire about best practice tools, available professional services, client collaboration, and insights into potential pitfalls.

Ask yourself:

- » Does the vendor provide best practice tools that adapt to various account plan templates for areas like opportunity or white space?
- » What professional services are available, and are they included with the technology subscription?
- » How does the vendor work with clients to ensure their programs will be successful?



- » Will the vendor share common pitfalls that could be barriers to our success?

4. Can they help me show ROI?

Demonstrating the value of your technology investment is crucial. Look for a vendor that can provide practical examples, work with you to develop a robust business case, and set expectations for the potential return on investment. The best vendors will genuinely partner with you on this.

Ask yourself:

- » Can the vendor calculate the estimated impact the solution will have on our organization?
- » Can they recommend the most meaningful KPIs to track to verify ROI?
- » Does the solution offer a way to report improvements over time, quantifying

impact to areas like revenue, efficiency, forecast accuracy, and others?

5. Does the solution integrate with your CRM?

Ensure compatibility with your CRM system is in place. While many account planning solutions integrate with CRMs, finding a vendor whose platform is flexible enough to work with any CRM is essential. Avoid the headache of having to reevaluate your entire account planning and execution solution if you ever switch CRMs.

Ask yourself:

- » Can the vendor provide a list of CRMs with which they integrate?
- » Can the solution integrate, batch, and synchronize with third-party applications such as marketing, customer success management, and financial/accounting systems?

6. What is the implementation and onboarding process?

Minimizing disruption to revenue-generating activities during implementation is crucial. Consider the resources required and involve IT if necessary. Inquire about the vendor's training offerings, duration, and post-training assets. Understand the typical proficiency timeline for users to ensure a smooth transition.

Ask yourself:

- » What resources do I need to make available to prepare for implementation? Does IT need to get involved?
- » Does the vendor provide training? How is it delivered, and what is the average duration of the training? What assets will be available to our team afterward to reinforce training (videos, user guides, FAQs)?
- » How long does it typically take users to be proficient in the solution?



7. How will your account be managed?

Building a trusted partnership with the suitable vendor means having the right people managing your account. Look for vendors with a mature customer success function, providing expert resources dedicated to your success. There is a lot to consider.

Ask yourself:

- » What does the post-sale experience look like?
- » How does the vendor determine the assignment of a customer success or account manager?
- » Do they have a customer journey or customer success process in place?

8. What kinds of organizations are finding success with the product?

Vendors should be willing to provide an example list of clients with backgrounds in utilizing the solution. But, more importantly, they should be able to highlight how they have delivered value to their clients.

Ask yourself:

- » Can they provide a current list of their clients?
- » Can you conduct reference calls with their customers?
- » Can they provide proof points, case studies, and other resources relevant to your business challenges and desired outcomes?

9. How can you access support?

Support is an integral part of selecting a solu-

tion. Should a problem arise with the solution, you want to speak with a vendor quickly. Find a vendor that offers a complete support process - preferably an established customer success team - ensuring that they will help you work through any product or implementation issues quickly and effectively.

Ask yourself:

- » What is the typical turnaround time for resolving technical issues with this vendor?
- » Does the vendor have Service Level Agreements in place?
- » What is the expected response if I have a critical issue?
- » Are support resources available via phone, email, chat, or social media?



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Conclusion

Selecting the right account-based sales (ABS) platform is paramount for driving growth and success in today's business landscape. By following the guidelines outlined in this guide, you can make an informed decision that aligns with your organization's unique requirements and future goals.

Remember, account management is constantly evolving, and collaboration across revenue-generating functions is now essential. With the right ABS platform, you can empower your revenue teams to take ownership of value creation and ongoing customer growth.

As you embark on this journey, consider the importance of simplicity and clarity. Break down complex ideas into actionable steps and provide concrete examples to guide your implementation. By doing so, you can ensure that your ABS program becomes a strategic driver for your organization's long-term success.

Now is the time to take your key account management to the next level. Embrace the opportunities provided by account-based sales, and leverage the power of technology, strategic planning, and collaboration to unlock the full potential of your key accounts.

By making the right choice and partnering with a vendor that understands your unique needs, you can transform your key accounts into strategic partnerships and drive exponential growth for your organization.

So, seize the opportunity, embark on your ABS journey, and position your organization for unparalleled success in the ever-evolving business landscape.

Remember: Your key accounts are not just customers; they are the gateway to unlimited growth. Choose wisely, act strategically, and drive your organization towards a future of sustained success. Start your ABS journey now with Revegy, [schedule time here](#).



See the Way to Win

Revegy is an account-based sales execution and optimization platform for top enterprises across the globe. The Revegy platform is a game-changing source of insight, helping your sales team stay aligned, deepen relationships, and drive measurable impact on revenue in their most important accounts and opportunities. More than 50,000 users from industry-leading companies like Fujitsu, Comcast, and Capgemini rely on Revegy to manage over \$30 billion in revenue. For more information, visit revegy.com.