Why CRM-Native Account Planning Tools Are the Foundation to Building Revenue

Successful sales organizations use account planning as the foundation of consistent, reliable growth. Streamlining account planning processes and making them scalable, repeatable, and easy to execute is the easiest path to generating more revenue.

But don't take our word for it. According to Gartner, sales teams that implement effective account planning methods increase their ability to grow an account by 48% and the likelihood of renewing or retaining the same amount of spending by 94%[1].

However, chances are that your account planning process feels shaky and disconnected, like a house without a solid foundation. You're not alone. Most organizations don't have a solid account planning process. In fact, more than half don't take advantage of account planning at all.

Why? Because most account planning is done using a series of offline tools or templates – most of which aren't connected to your system of record: the CRM.

At best, that means reps are entering new sales activity data into the CRM, porting that same information into their documented account plans, and then correlating all of that information into reports for quarterly business reviews, deal calls, and other milestones.

Even in this scenario, there is a lack of consistency across teams and regions with how reps capture and maintain their account plans, not to mention that sales managers will have a difficult time measuring and tracking the impact of these efforts. In the long run, perceived value declines, which eventually leads to a fall-off in execution.

But most reps aren't even doing this manual tabulation of data for account plan maintenance. Not consistently, anyway. So, once again, that means annual plans are scrapped, wasting valuable time.

Your blueprint for building revenue through more effective account planning:

- **Efficient account planning:** Automating administrative tasks makes it easier for leadership to reinforce sales strategies. GTM teams adhere to best practices and keep pipeline moving by engaging the right accounts at the right time.
- **Increased pipeline:** With newly streamlined and orchestrated processes, GTM teams can better adhere to sales planning best practices, helping sellers keep the pipeline full within target accounts.
- **Improved quota attainment:** Better visibility into account plan execution gives sales managers and leaders the insights they need to coach reps on active opportunities and mining for pipeline within other priority accounts.
- **Reduced sales churn:** Sellers feel more rewarded and supported with data and tools that validate they're following plans and are on the right path, reducing costly turnover.

1 Gartner, ""B2B Sales: Why Your Account Growth Strategy Needs an Update"

Feel right at home using CRM-native tools to build and execute account-level strategies with ease

If you believe that quota attainment and revenue growth is built on solid account plan execution, then it's time to take a closer look at how you construct them, from the ground up.

People.ai delivers a number of intuitive tools that help sales teams build, execute, measure, and improve their strategic account plans. All of these powerful capabilities are integrated natively within your CRM – limiting tool fatigue and eliminating ramp time by embedding value-added insights to augment your sellers' existing processes.

Account Scorecards
Diagnose account status and take immediate action using insights calculated by AI-driven engagement scores – i.e., how well your sellers are penetrating their target accounts, based on activity levels from similar accounts where you've had the most success. Scorecards are customizable based on your qualification methodology, ensuring your team is primed and ready to use this capability, while also driving higher adoption rates for account plans and your larger sales methodology.

Whitespace Maps
Visualize the most effective route to new revenue streams. Pinpoint new, cross-sell, and upsell opportunities within accounts that are prime candidates for your offerings, and understand competitive footprints to assess strengths and potential threats. In essence, this becomes both an organizational tool and lead source, all native in your CRM.

Relationship Maps
Continuously track the buying group of priority accounts – even as people get promoted or leave. Help sellers understand the influence each buyer wields, map their connections to other advocates, ensure your team is ready to engage the right people at the right time, and help managers coach reps on how to better develop or de-risk accounts.

How a global leader in sensor, software, and autonomous solutions transformed its sales planning strategy using data and insights

"With People.ai data, we're discussing with our sales enablement training team and senior leadership to leverage the insights for better planning and execution. Now that we see what's going on in the field, we know what we need to work on for sales coverage or finding the right people for these roles."

Eric Chapman
Vice President, Sales Operations and Enablement

HEXAGON

Outcomes Included:

80K new contacts added to its CRM

35% increase in customer meetings

Greater pipeline predictability and forecast accuracy

Read the full case study

Reconstruct your account planning approach with People.ai

Learn how sales teams can leverage account planning software where they already live – your CRM – to work more efficiently and build a healthier pipeline. Download our workbook or request a demo today.