

Account Development Planning Guide

This guide is designed to help your organization create and implement your own Account Development Planning process. The content and format below will change as you refine and customize your own approach. It is important to prioritize client engagement throughout your planning process, so make a point to start the conversations with clients, partners, collaborators, and others early.

Your internal client account team should schedule at least two initial meetings to develop the plan. The first meeting will gather information you already know and highlight the information you must gather through research and conversations. Those first few conversations will be your first action items. You may want and need to jump around in the planning process as it develops, but be sure to leave the “new business” conversations until you’ve gotten a clear understanding first. The elements of the Plan are:

Purpose, Principles, and Vision

The **Purpose** of the Account Development Plan is your *Why*. Why is this client important to your organization? When you rank this client against others using whatever criteria you choose, why do they rise to the top? Revenue? Growth opportunities? Deep alignment with culture, values, and mission? Each time your team revisits this account plan, it’s important to use this Purpose as a touchstone, reminding all of you about why you are investing your valuable time in this effort.

Principles are guidelines, guardrails, and constraints for this effort. These principles are often connected to your **Values**. These guidelines let you judge the ongoing relationship. If an account seeks to change your working arrangement, asks you to do things you won’t do, starts moving in a direction that doesn’t align with your firm values, then these principles give you the ability to engage your important client to address the issues. And if the client’s path continues to deviate from yours, you can walk away.

The **Vision** is a shared picture of success that answers the question, “What does a successful future look like in the future?” It might be related to a new project together, or maybe some percentage of growth, or simply a mutually beneficial relationship with strong collaboration and open communication. If that picture of success is hard to define, or if your team members all come up with radically different images in their heads, you might need to question the rationale for the effort (the Purpose) and press the reset button.

This process is founded on David Allen’s GTD® (Getting Things Done) 6 Horizons of Focus, and subsequent sections in this guide align with this excellent process for planning and for *getting things done*.

Some questions to consider:

Purpose: Why are we doing this? Why is this important to us?

Principles: What are our constraints? Standards or values? What would make us stop and rethink this relationship?

Vision: Create a shared picture of success. What does it look like?

Client Background & Contract History

A brief narrative on the relationship tells the story of your time together. It helps newer team members understand the genesis of the relationship and the path it has taken to become what it is today

This section should also include previous projects (if you are a project-based firm) with related revenue data. If you are developing this firm around an important Partner or Center of Influence, this information should include shared clients.

People (and Places)

This section is focused on people and relationships. Your internal team members. The client's people. Even people you don't know yet at the client account. If they are important to the relationship in any way, your plan should capture them.

Related contacts should also be included. Partners, sub-consultants, Centers of Influence, and any other people who are in some way connected to your relationship with the client should be in there. Maybe you were introduced to the client years ago by a mutual connection who you haven't spoken to recently. Whoever that person is, include them.

Assign a "Relationship Score" to every external person in the plan. This simple scoring system identifies who your internal contact knows, and how well they know them. Consider scoring people you don't know a "0" and those with whom you have long, trusting relationships with a "3". Everyone in the middle somewhere gets a "1 or 2". If you need a more detailed scoring system, create one.

You may want to note the location of the contacts in your plan. Sometimes you are dealing with geographically dispersed client accounts or partners. If location is of importance to your organization and this plan, be sure to note it.

Your table might look like this:

Client Contact: Name, Role, Location	Rel. Score*	Notes
Susan Miller, PM, Seattle office	3, MJ	Susan recently left

*Relationship Score: 0-none, 1-Familiar/Known, 2-Contact, 3-Advocate; Include INITIALS of internal contact

Other Contacts: Name, Role, Location	Rel. Score*	Notes
Scott Wells, structural engineer, Portland	1, MJ	New to the team; possible connections in Portland

The Client Relationship (Problems?)

The truth is, most relationships have their ups and downs. Whether they are personal or professional, maintaining good, long-term relationships is a challenge, particularly in a complex business arrangement.

The Account Planning process must uncover the status of the relationship and identify any and all supporting evidence. Complimentary emails, critical memos, and notes from tense business meetings can be included in the plan. This permits the team to revisit any outstanding issues and set a plan for resolution. Even problems that have seemingly faded can reappear, so it's best to assume that anything that managed to go sideways, stayed sideways.

No matter how we try to ignore or downplay them, unaddressed issues are major barriers to improving and advancing important relationships. If problems exist, your team must address them before your plan has a chance to succeed. Losing an important, long-term relationship because of an unresolved issue is an unfortunate and all too common reality that you can prevent.

Some questions to consider:

What is the status of our current relationship? Good, bad, don't know? What are the details?

Do any issues or concerns exist? If so, what are they? Even small things can be a big deal to some.

Did any issues or conflicts arise previously? If so, how were they resolved?

What is the plan to address and resolve any open issues? What specific actions are required?

Priorities, Preferences, Positioning, and your Proposition

This section is not about your organization's priorities and preferences... it's all about your client. Uncovering and understanding your client's most pressing priorities, challenges, opportunities, and needs will require research and many person-to-person conversations. This is getting to know what's most important to them.

Your client's preferences speak to why they choose you over your competitors, or even why they, on occasion, choose others over you. What characteristics and qualities do they seek when assessing their work with consultants like you? What things do firms like yours do that keep them up at night?

These conversations also let you understand how they see your organization in the world of competitors. Imagine your company as a star in orbit around your client's world. What makes your star stand out? What makes your firm different and better for a particular need they have?

Once you understand your client's biggest priorities, preferences (pet peeves?), and how you are positioned, you can develop a *Unique Selling Proposition* for this client account. A proper unique selling proposition combines the specific needs, priorities, and preferences of your client with your specific expertise and experience. This yields a truly unique offering for that one special client. Because Account Development Plans are so laser-focused on one client, your statement should be equally focused, even down to the individual needs of your respective client contacts and skills of your consultant team members.

Questions for this section:

What are the top business/organizational goals and priorities of the client account?

What challenges or needs exist for the client?

What characteristics does this account look for when they contract/partner with you or others?

What characteristics or qualities do they avoid?

Which characteristics, qualities, goals, and priorities align with our goals and values?

Are there additional services or assistance we can provide beyond what we do now?

What is our *Unique Selling Proposition*?

A note on your Unique Selling Proposition

It's easy for a firm to put their blinders on and believe they are different from other firms in the marketplace, simply because they lack the deep knowledge and awareness of their competition. It is critical to take a realistic view of how your firm is positioned and what you offer your clients that others don't - and then go talk to them about it. Ask your clients if they see you the same way you see yourselves.

Here's a sample framework to get you started with a Unique Selling Proposition:

Our [*company/service*] is for [*your client*] who needs [*your offering*]. [*Your company/service*] is the one [*unique differentiator*] that [*unique benefit you offer*] unlike [*your competitors*].

Possibilities (aka New Business Opportunities)

There is a time for everything, and hopefully it has become clear that, with these Account Development Plans, many important things must come before the conversations about new business.

Getting to know the people you don't in your client's organization should be a priority. Resolving outstanding issues before they turn into big problems should be a priority. Learning everything you can about your client's priorities, challenges, and desires should be a priority. All of these things should happen prior to talking about new business.

When the time comes, though, you should have conversations about new business opportunities that align with your Unique Selling Proposition and are an excellent fit for your expertise.

Don't overlook **related opportunities** from those partners, sub-consultants, and other related contacts you listed early in the plan. If you've worked together with this client account, they've seen first-hand the excellent work your firm provides. Go talk to them to uncover opportunities to work together again. Your table might include this information:

Opportunity	Timing	Est. Revenue	Notes
New mixed-use bldg in Portland	Spring 2023	\$400K	Talk to John in Nov

The Plan

Account Development Plans have a specific goal: To preserve and grow revenue and trust with our most important client accounts. Your team may come up with additional goals to pursue. The various activities and tasks you create in your plan should all be pointing at that goal. Each team member involved in the planning process should create clear activities and deadlines to advance your firm towards that goal. Those goals might be listed in a table like this:

Plan Goals	Metrics: <i>Current and Future</i>	Internal Owner

If you want to be able to measure your success, then your progress will need to be measurable. If you have revenue goals, what are they? Is one of your goals to get to know more people at the client account? How many? The metrics you choose don't need to be complex or impossible to achieve, they just need to be clear.

Account Development Plans empower your team to be proactive. All too often, practitioners in professional services firms wait for leads to come to them or for the Request for Proposals to land on their desk. This proactive approach lets your firm determine its own future and become the firm it wants to be. List your various Activities and due dates like this:

Next Activity	Owner	Due Date	Complete ✓

Implementation of your Account Development Plans

Dwight D. Eisenhower once said, "Plans are nothing; planning is everything." Completing a plan is meaningless without proper execution. Activities flow from your Account Development Plan, so everyone needs to manage their own activities and be accountable for getting things done. Regular team meetings will focus on new developments with your client account, new information learned from partners and others, and new business that emerges.

Many project-based teams use project management tools in their day-to-day work. As such, it makes sense to leverage these tools in your Account Development Plans. Running this process like any other project in your firm will increase the likelihood of success.

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