

4 Tips For Effective & Strategic Account Planning



Strategic account planning goes far beyond the initial contract signing. Account planning should be focused on strategic engagement and being interconnected; building a more collaborative and cooperative relationship with your clients and accounts.

Consider the following 4 strategic account planning tips:

1. First, understand your customer's strategy and what processes they have already implemented
2. Articulate common practices and tools with a clear vision derived on successful communication
3. Collaborate with your customer and become a trusted partner
4. Ask for and implement improvements; not just until it's tied to the culture, but to corporate habit

In addition to your planning tactics, consider the right tools incorporate into your overall plan—both a cloud-based CRM and an ATS are equally important for management and execution. A combination of the two must have the intuitive ability to help strategize, drive, support and manage the entire sales process from cold call to close.

Tip #1 Understand Your Customer's Strategy

Unfortunately, many companies don't look at customers through the segments of wants and needs--or lack sharing the information effectively. Segment your customers based on needs and value. Needs are defined as what your customers actually want, need and expect from you. Value is defined as what your customer are (or may be) worth to you.

By understanding what they need from you versus what they have already implemented will help you pitch a better solution to them, perhaps.

Tip #2 Best Practices, Tools and Communication

Be an expert and knowledgeable in your field -- after all, your customer came to you for your expertise, services and solutions. Be diligent in communicating to them how to effectively incorporate your suggestions for considering best practices and the tools they should use to manage and execute their goals.

Tip #3 Become a Trusted Partner

Sure, you can be successful in providing your customer a winning solution, but the relationship needs more than that to be successful long-term. Nowadays, people want to stick with a service or product that works for them, but if the relationship isn't there, it's not going to work out for them in the end, so make sure you establish a solid relationship with your client. They trust in you to

provide them the best knowledge, resources, tools and advice to make them successful in their roles and with their clients. Loyalty goes a long way.

Tip #4 Request and Implement Improvements

There's always room for improvement so speaking up and letting your client know how to and when they can make such adjustments shows you are looking out for their best interest and the overall success of the company. Supporting your client in any way you can will only benefit you further down the road.

Conclusion

With consideration of these 4 tips for effective and strategic account planning, your firm can generate additional streams of revenue year after year, while driving customer loyalty and growth.

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