A FLUENT VISION

AFV-102 Account Planning

OVERVIEW

A critical element to consultative selling is the ability to effectively manage and plan accounts. Using information gathered during the sales cycle to create an account plan can solidify your customer relationship and uncover otherwise hidden opportunities. Proper account planning will enable you to identify specific actions, resources, and milestones to develop long-term customer annuity, and earn you trusted advisor status.

The Account Planning curriculum provides the knowledge, skills, and tools necessary to plan effectively for increased business and additional penetration into existing accounts.

CURRICULUM OUTLINE

- Business profiling
  - Organizational & executive profiling
  - Gathering the profile
- Finance
- Features & benefits
- Messaging
- Effective questioning to qualify
  - Needs assessment
- Solution strategy
- Objection handling
- Action
  - Action items & follow-up
- Resources
  - Internal & external resource allocation
- Forecasting

TARGET AUDIENCE

- Sales reps at all levels
- Sales managers
- Anyone within the sales organization involved with execution or client management

COURSE OBJECTIVES

- Target the right industry, market and client with profiling techniques.
- Gather effective profile data.
- Identify financial motivators and leverage them in the solution process.
- Identify gaps in your understanding of a prospect, and develop a plan to bridge them.
- Differentiate between features and benefits and explain the importance of providing both to the prospect.
- Ask questions that reveal and qualify a prospect’s needs and practice effective listening.
- Develop compelling messaging to create demand within accounts.
- Craft a strategy based on current needs.
- Enable and track internal and external collaboration by delegating action items and following up.
- Identify and align resources that will help you achieve your goals.
- Work with event-based forecast system to ensure a qualified pipeline.

COORDINATING ENHANCEMENTS

- Account Planning Toolkit (AFV-204)
- Virtual Sales Manager™ Program (AFV-301)

AFV
A FLUENT VISION, L.L.C.

info@afluentvision.com
www.afluentvision.com/sales-institue

A FLUENT VISION

AFV-204 Account Planning Toolkit

OVERVIEW

The cornerstone of Creating an Annuity with Account Planning (AFV-104) course is the Account Planning Toolkit. The toolkit is intended to provide sales representatives a place to input the information necessary to create a successful account planning strategy with their customers.

The Account Planning toolkit will result in structure and continuity in a relationship that will help sales representatives to earn trusted advisor status.

TOOLKIT ELEMENTS

- Account history
- Account baseline questions
- Profile decision makers
- Company profile
- Finance
- SWOT analysis
- Solution strategy
- Meetings
- Evaluations
- Demos
- Proof of concept
- Account summary

TARGET AUDIENCE

- Sales reps at all levels
- Sales managers
- Anyone involved with execution within the sales organization

TOOLKIT OBJECTIVES

- Provide structure and continuity in a relationship that will help to earn trusted advisor status through account planning.
- Secure existing annuities and create new annuities.
- Identify the appropriate clients that would benefit from an account plan.
- Uncover and answer questions related to business processes, intended to identify and bridge knowledge gaps in an account.
- Use the financial data of an organization to make a case for a solution.
- Craft a strategy based on both short and long-term goals.

PREREQUISITE

- Completion of Account Planning course (AFV-104)

AFV
A FLUENT VISION, L.L.C.

info@afluentvision.com
www.afluentvision.com/sales-institue

A FLUENT VISION

AFV-301 Virtual Sales Manager™

OVERVIEW

A key component to the long-term success of any education initiative is reinforcement. AFVSI offers post-course support through its ninety-day Virtual Sales Manager™ (VSM) program.

The purpose of the VSM program is to enhance the skills learned by ensuring their consistent deployment. VSM provides sales professionals the opportunity to work one-on-one with AFV on a regular basis in order to increase organizational effectiveness, return on investment and individual consistency.

PROGRAM ELEMENTS

– Sales Help Desk: A timely resource to get answers to questions on the consultative sales techniques discussed within a course
– Coaching & mentoring sessions: One-on-one meetings with AFV sales experts to review strategies to put into practice skills gained throughout a course
– Continuing education webinars: Expand course principles with webinars on topics & techniques needed for success
– On-demand webinars: Access to pre-recorded webinars for those that were not able to attend or want to review topics
– Subscription to A Fluent Moment eNewsletter: A quarterly eNewsletter that explores the skills & processes necessary for success in today's sales environment
– Virtual Sales Manager Tools: Templates and resources designed to ensure an understanding of the principles of the training and help incorporate them in everyday activities

TARGET AUDIENCE

– CXO
– Owners
– VPs/Directors
– Sales managers
– Sales reps at all levels
– Any executives involved with corporate sales infrastructure
– Anyone involved with execution within the sales organization

PROGRAM OBJECTIVES

– Provide access to experienced sales professionals, managers and sales executives.
– Provide guidance via one-on-one coaching and mentoring sessions.
– Assist in strategy to implement and utilize the skills, tools, programs and best practices provided during courses.

PREREQUISITE

– Completion of any AFV course(s)

A Fluent Vision L.L.C.

A Sales Infrastructure Consultancy

About AFV

Built on over 75 years of combined experience in the technology sector, A Fluent Vision L.L.C. (AFV) is uniquely equipped to help companies achieve increased revenues, higher profits and a level of sales management that is required in today's business climate.

At AFV we believe in working within your corporate culture to capitalize on your unique personality while maximizing company potential. We provide hands-on opportunities for you and your team to modify specifics of your sales infrastructure to ensure maximum efficiency.

AFV's programs empower you to get to the right people, at the right time and to attain the proper information to shorten the sales cycle.

Solutions

Consulting services

The backbone of all AFV activities is our ability to understand client environments and analyze industry trends; allowing AFV to create synergistic solutions to specific client challenges. Custom engagements are available to help you.

Channel strategies

AFV's provides channel marketing organizations with the resources to further develop their partners through increased program awareness and participation. Channel resource executives and program directors can recruit, on-board, nurture and grow channel partners towards long-term revenue momentum, while gaining a better understanding of their partner's business needs, requirements and challenges.

Channel marketing as a service

Channel Marketing as a Service helps partners to execute demand generation campaigns resulting in net new leads. Our marketing specialists can guide partners through a comprehensive planning, creation, execution and evolution process to ensure proactive demand generation activities are regularly happening throughout your channel – throughout the year. This means the creation of a predictable and manageable partner pipeline.

Education programs

Using a proven consultative approach to selling, AFV offers customized and focused education programs on creating solid sales infrastructures. Programs for owners, sales managers, salespeople and sales engineers are available.

Reinforcement resources & tools

After a workshop you're normally left to your own devices. This where the return on your investment of time is lost. This is not the case with AFV--we provide interactive tools that reinforce and expand on program topics. Execution is critical to sales success. AFVSI resources & tools show the path to successful execution.

AFV
A FLUENT VISION, L.L.C.

info@afluentvision.com
www.afluentvision.com/sales-institue

A FLUENT VISION L.L.C.

Delivery Solutions

Expertise

All curriculum modules are delivered by an AFV industry expert, with years of experience working with sales organizations and building successful, scalable sales infrastructures

.

Robert Keller

Managing Partner and Co-Founder

Randy Sasaki

Partner

AFV
A FLUENT VISION, L.L.C.

Delivery Options

All curriculum modules can be delivered as face-to-face workshops, live e-learning, on-demand e-learning or as a combination of any of these delivery platforms.

The delivery platform and length of any program will be determined jointly by AFV and client, based on the best fit for the client.

Face-to-face workshops

Interactive face-to-face workshops to provide attendees with instruction designed to teach students utilizing a proven learning techniques that create long-term results. Attendees are challenged with hands-on labs and activities that help them execute more effectively upon return to the sales field.

Live e-learning

Live online educational courses where attendees are challenged with learning activities and can submit questions to get real-time answers.

On-demand e-learning

On-demand courses for attendees to gain awareness of topics at their convenience.

Toolkits

AFV toolkits provide users with the resources, templates and skills to assist with successfully shortening a sales cycle and closing business. Toolkits can be created as web-based tools, mobile apps or in Excel.

Virtual Support

Virtual support for sales organizations to enhance sales skills by ensuring their consistent deployment and achieving their goals.

info@afluentvision.com
www.afluentvision.com/sales-institue

Our Leadership

Robert Keller
Managing Partner

Robert Keller, Managing Partner and Co-Founder of A Fluent Vision, L.L.C. has over 30 years of experience in the technology industry and an impressive track record, with experience in the technology industry, focusing on sales and business development. Prior to co-founding AFV, Robert was Founder and President of A.S.K. Data Communications, Inc., a regional value added reseller that was incorporated in February 1994. A.S.K. was named to INC 500's Fastest Growing Privately Held Companies in America in 1999 and 2000.

As an expert in strategic planning, sales infrastructure and new business development, Robert has worked with clients such as Citrix, Tech Data and Derive to add value to their organizations by recognizing opportunities, creating business strategy and promoting resource development. His pragmatic "voice of reason" approach to business lends to his ability to transform visions into profitable realities.

Contact Robert: rkeller@afluentvi sion.com

Randy Sasaki
Partner

Randy Sasaki has excelled in sales management, sales operations and business unit management for over 25 years. As a Partner at A Fluent Vision, Randy now leverages his experience to increase his client's ability to deliver channel readiness and sales results.

Randy began his management career as a Managing Partner for IKON Solutions. While servicing medium businesses and Fortune 500 clients, he won numerous leadership awards for successfully improving client satisfaction, sales revenues, operating efficiencies and profits. As a Managing Director at All Covered, he delivered managed network services throughout the United States. His successful leadership in IT sales, marketing, and engineering services is the core for A Fluent Vision's Channel Resource Center.

Randy's award winning track record in sales management and operations, and financial experience have assisted his clients to develop successful strategic and tactical sales plans in the high-tech industry channels.

Contact Randy:rsasaki@afluentvision.com