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Account Planner by DemandFarm

What Is Account Planner?

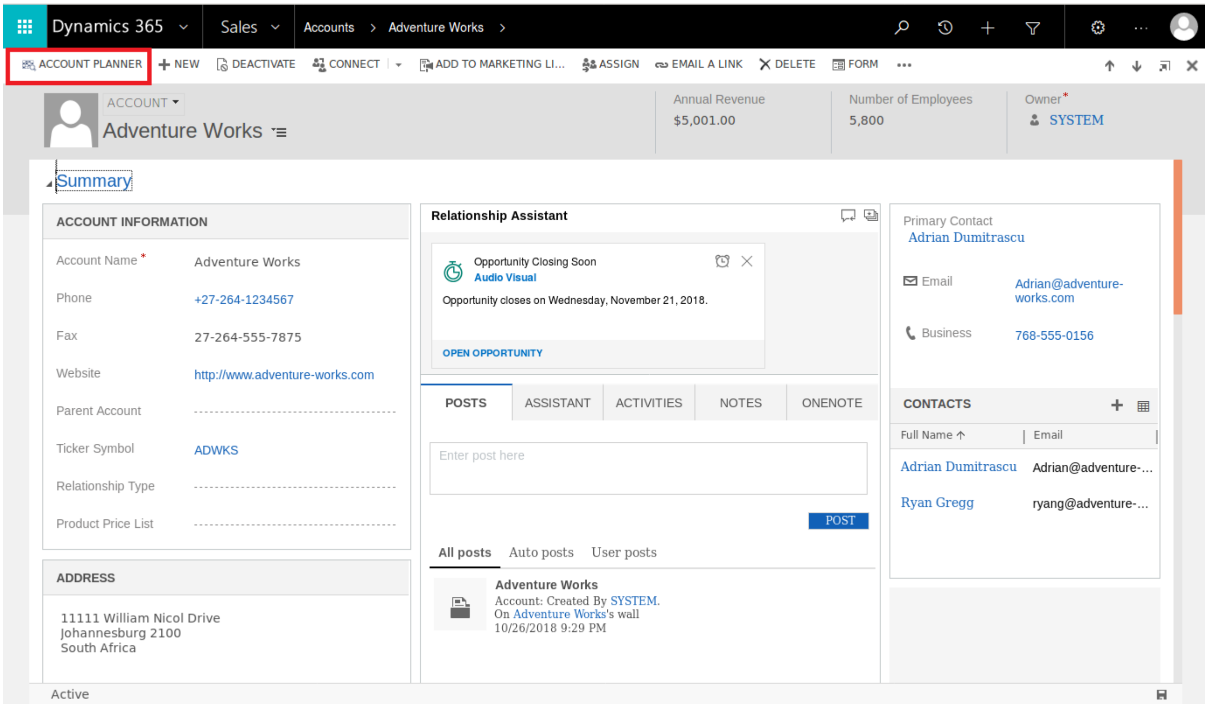
Account Planner application on MS Dynamics that gives you a visual Account Planner of your business within an account

A visual, single page application that lets you -

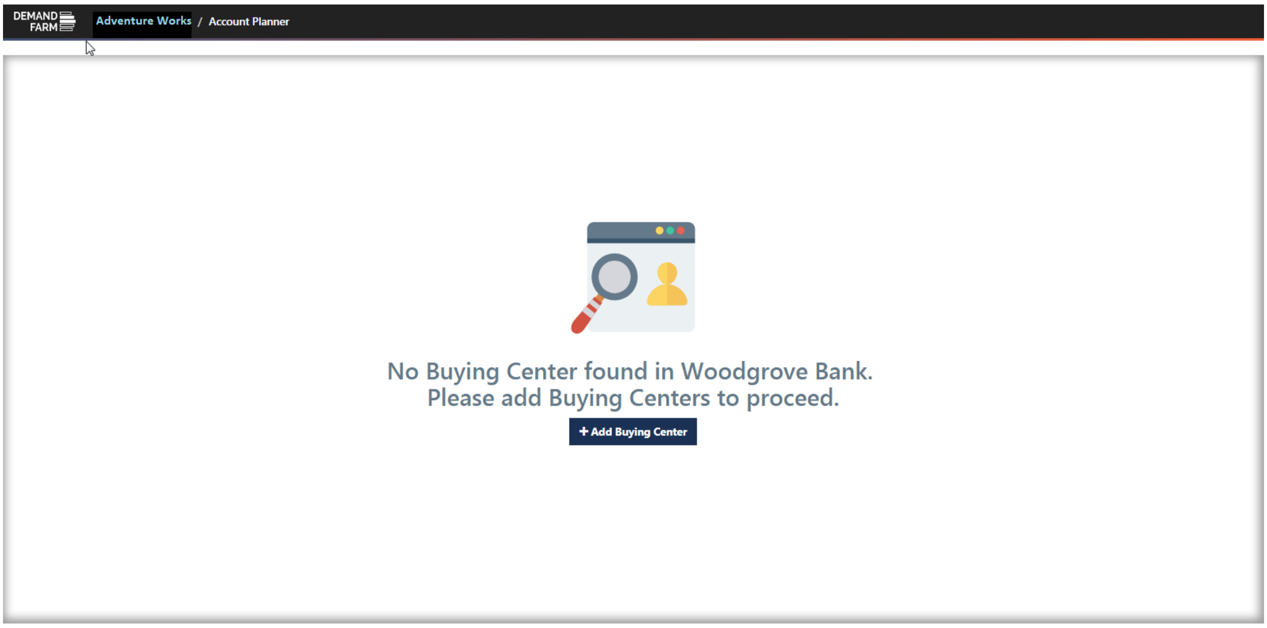
- Grow your Accounts by creating an Account Planner & identifying Buying Centers within the account and map them with the right products/solutions
- See where you are selling (or not) offering wise and customer wise
- Identify focus areas by marking your whitespaces
- Build an account strategy
- Set and track revenue goal

Navigating to Account Planner in MS Dynamics

To access the Account Planner application on Microsoft Dynamics, navigate to the 'Accounts' tab on the Dynamics dashboard and select the account you wish to view.
Click the 'Account Planner' button at the top of the screen to access the application for this account

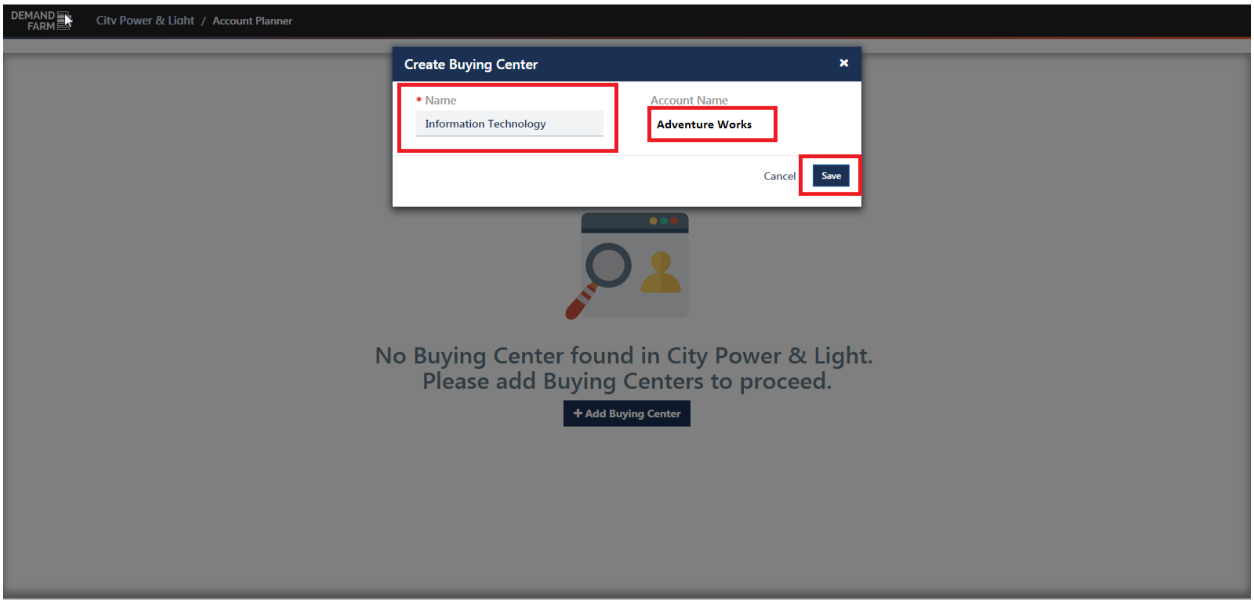


Account Planner View

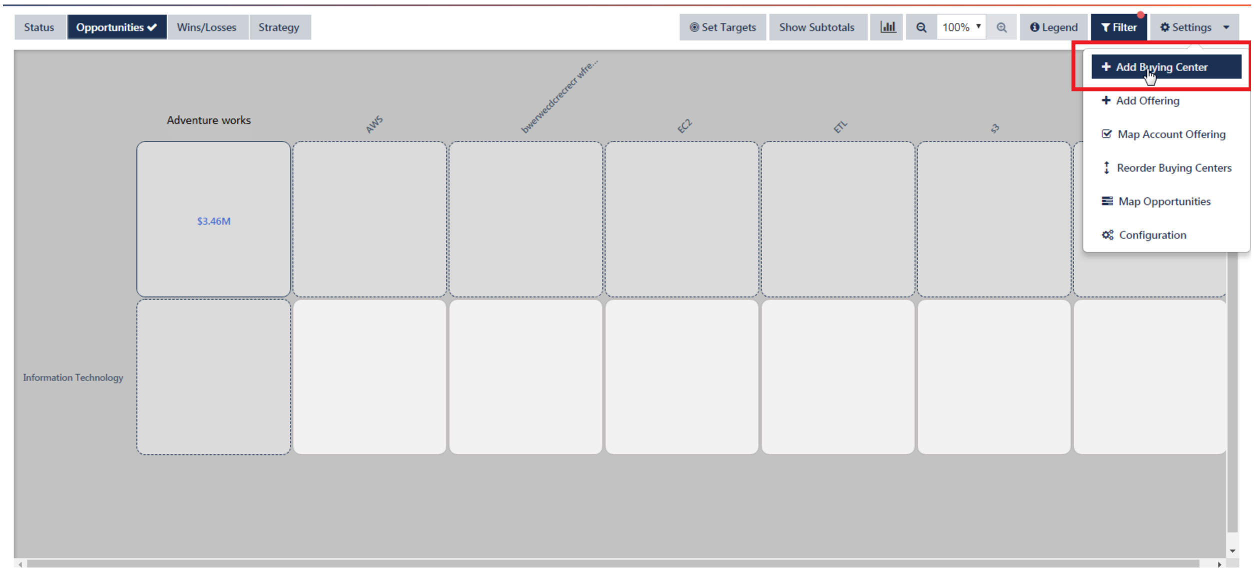


Upon logging in for the 1st time, the Account may or may not have the buying centers, if no buying centers present for that Account, the Account Planner will be the Empty canvas which suggests the user to create the Buying centers

Add Buying Center



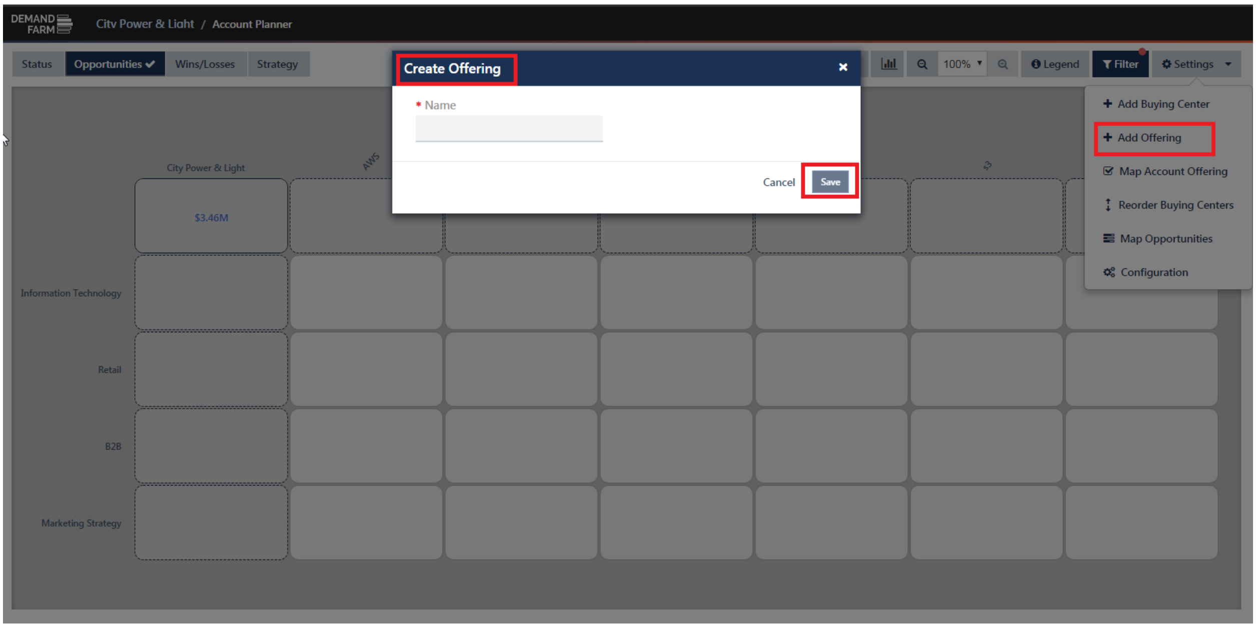
- The user will enter the name of buying center and click on “save” button
- The user can also Create buying center by clicking on “Add Buying Center” option present on the top right **Setting** menu (Please see below-attached screenshot)



Note: *Created buying center automatically mapped to the selected account*

Add Offering

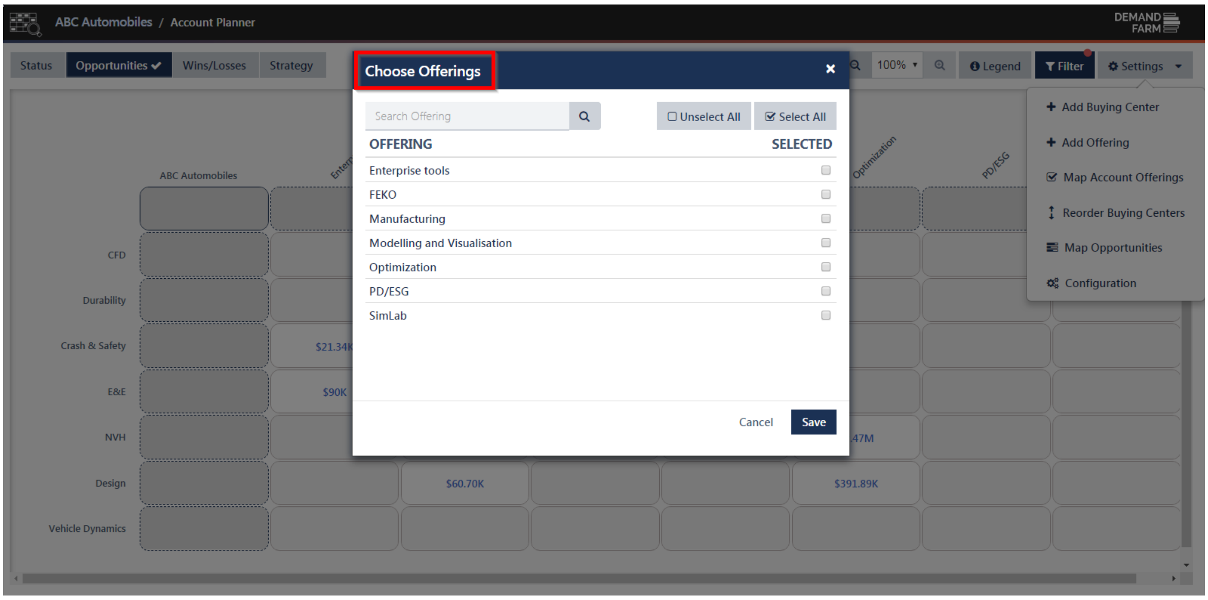
Click on the 'Add Offering' present on the right-hand side of the Account Planner overview page as shown in figure



If no Offerings are present, then the Empty Account Planner canvas will suggest the user to create the Offering

Map Account Offering

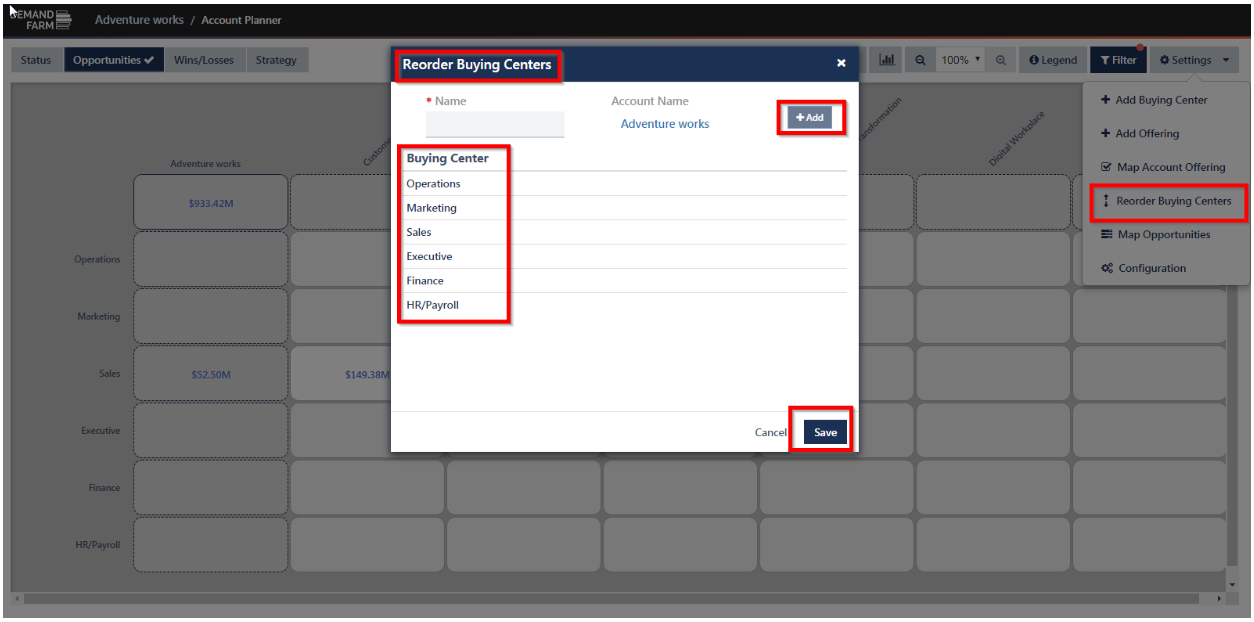
Click on the ‘**Map Account Offering**’ present on the right-hand side of the Account Planner overview page as shown in figure



- The map account offering can focus on showing only the relevant offerings instead of showing all the defined offerings. Relevant offerings for an account consist of the offerings where there is already some business and offerings where there may a potential to do business in the future
- By using search option, user will able to search offering by its name and If user want to see all records, he must have to click on (x) button to clear search field

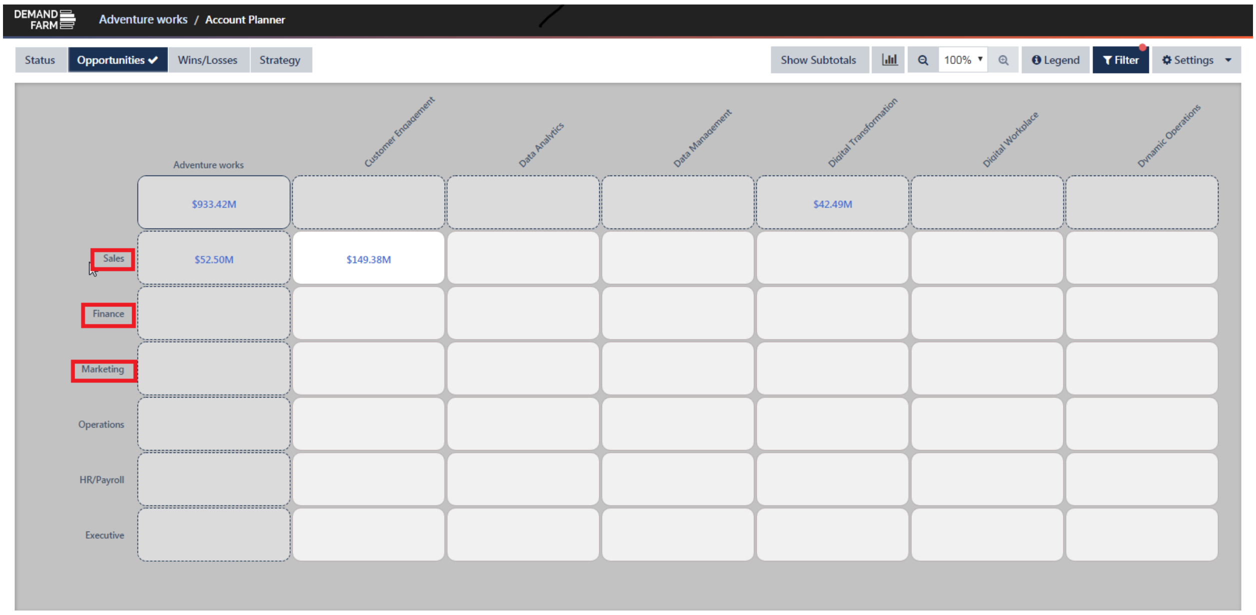
Reorder Buying Centre

Click on the ‘Reorder Buying Center’ present on the right-hand side of the Account Planner overview page as shown in figure



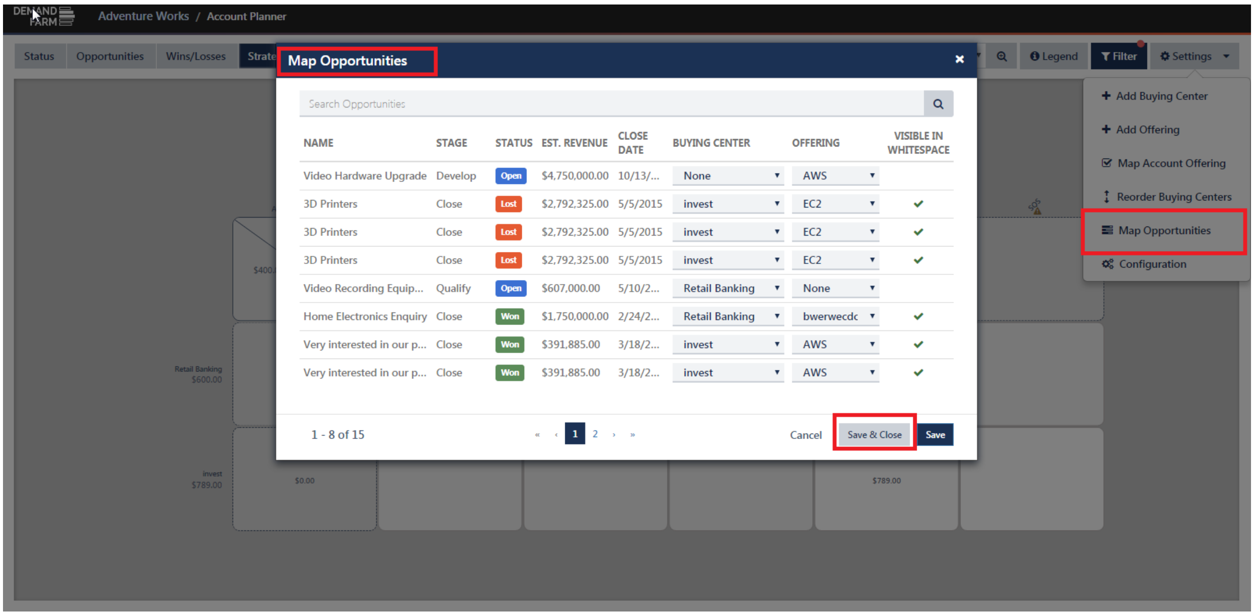
- Display buying centers on account planner screen can be customized by reordering buying center within the account planner screen
- Here the user can change the order of buying center display by moving an individual item at top or bottom etc.

Now Account Planner main screen display buying centers as per mentioned order



Map Opportunities

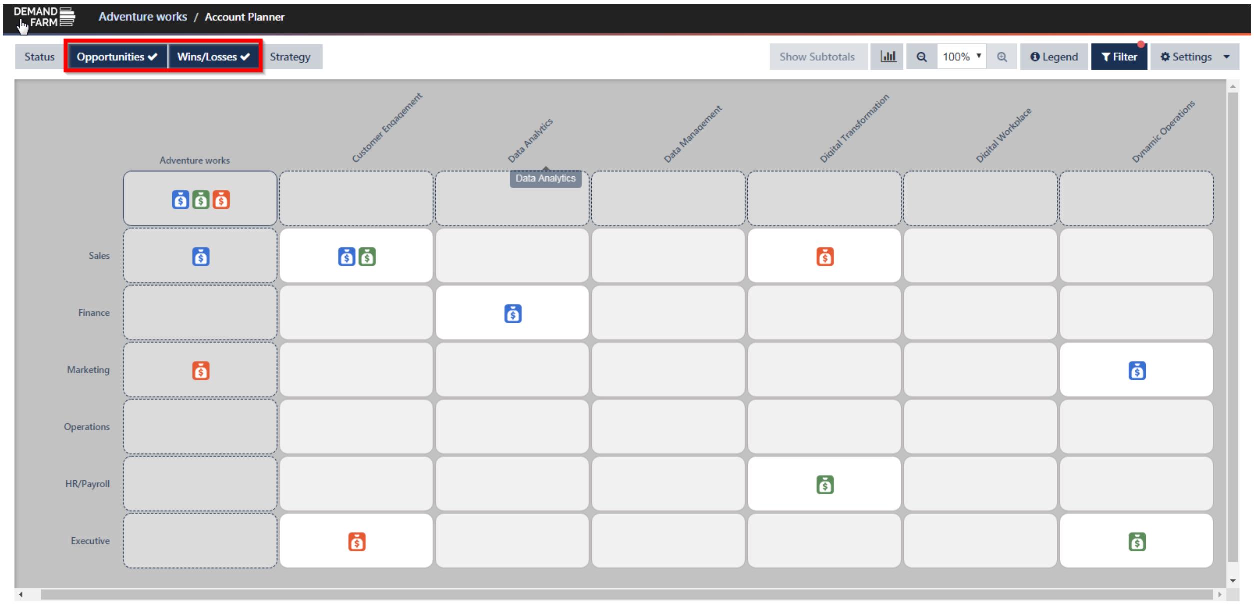
Click on the ‘Map Opportunities’ present on the right-hand side of the Account Planner overview page as shown in figure



Columns to Display

1. **NAME**: Opportunity Name
2. **STAGE**: Sales stage of opportunity
3. **STATUS**: Status of opportunity
4. **EST. REVENUE**: The sum of the amount for the opportunities
5. **CLOSE DATE**: Close date of the opportunity
6. **BUYING CENTER**: Account associated buying center list and None
7. **OFFERING**: All Offering List and None
8. **VISIBLE IN WHITESPACE**: Buying center and Offering mapped then its visible on Account Planner

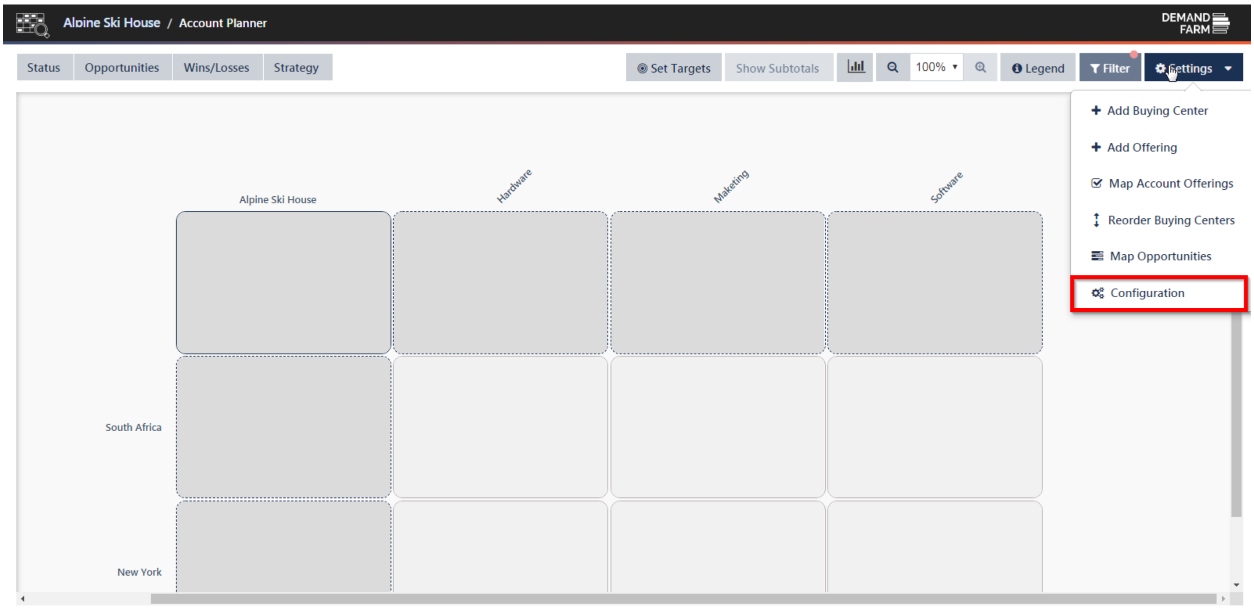
- Users can map ‘Buying Centers’ or ‘Offerings’ to the available account Opportunities.
- Only Selected Account Opportunities can be shown.
- The user can remove/dissociate offering or buying center from opportunities. Click ‘Save & Close’ once done
- **Search Opportunities**: By using search option, user will able to search **Opportunities** by its name and If user want to see all records, he must have to click on (x) button to clear search field
- In Account hierarchy, user will able to see only mapped opportunity for selected account, parent will not able to see child opportunity and vice versa



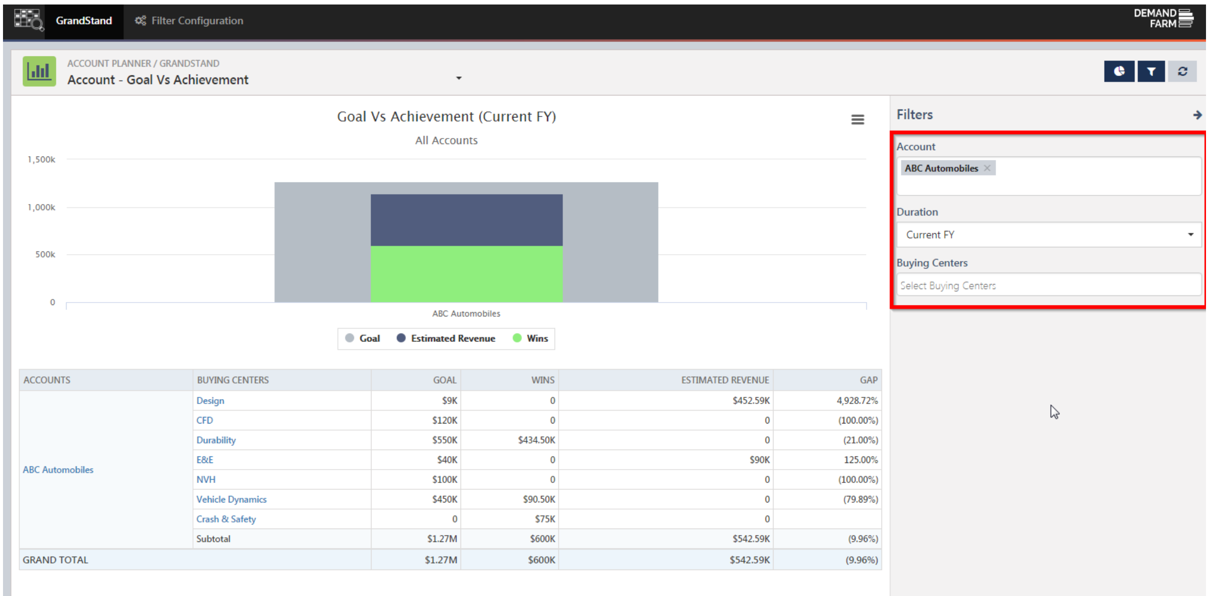
- The total revenue of the active opportunity or win and loss opportunity has been displayed in account cell
- Revenue could be differing to the original revenue (Present on the Account Cell) when the opportunity mapped to the buying center and offering

Configuration

Click on the '**Configuration**' present on the right-hand side of the Account Planner overview page as shown in figure



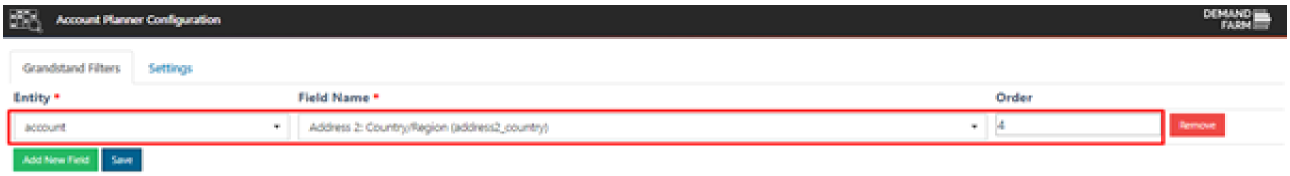
Account planner provides three default filters in the grandstand report highlighted in below screenshot



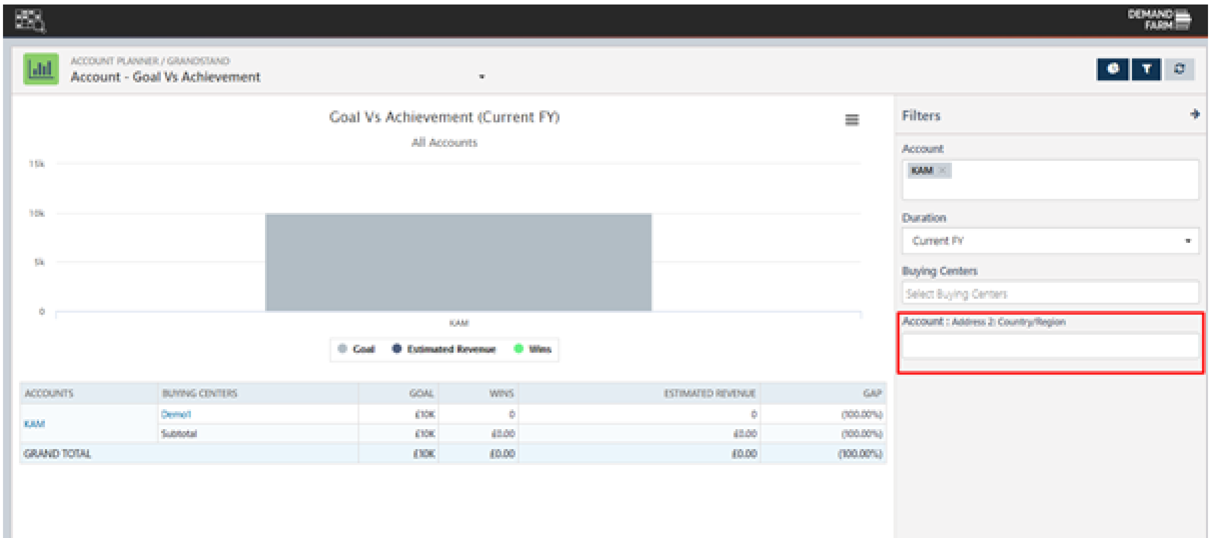
Additional filters can be configured by adding “Dashboard Filter” on Opportunity, Account, Buying Center and Offering entities. Currently Account Planner supports following types of Grandstand filters.

1. String
2. Boolean
3. Date
4. Picklist
5. Currency

The user can add additional filter by opening Settings -> Configuration -> Grandstand Filters page. Choose Entity, Fields and order of the filter and save the form as highlighted in below screen shot.



Now additional filters will be shown in Grandstand page as below screenshot.

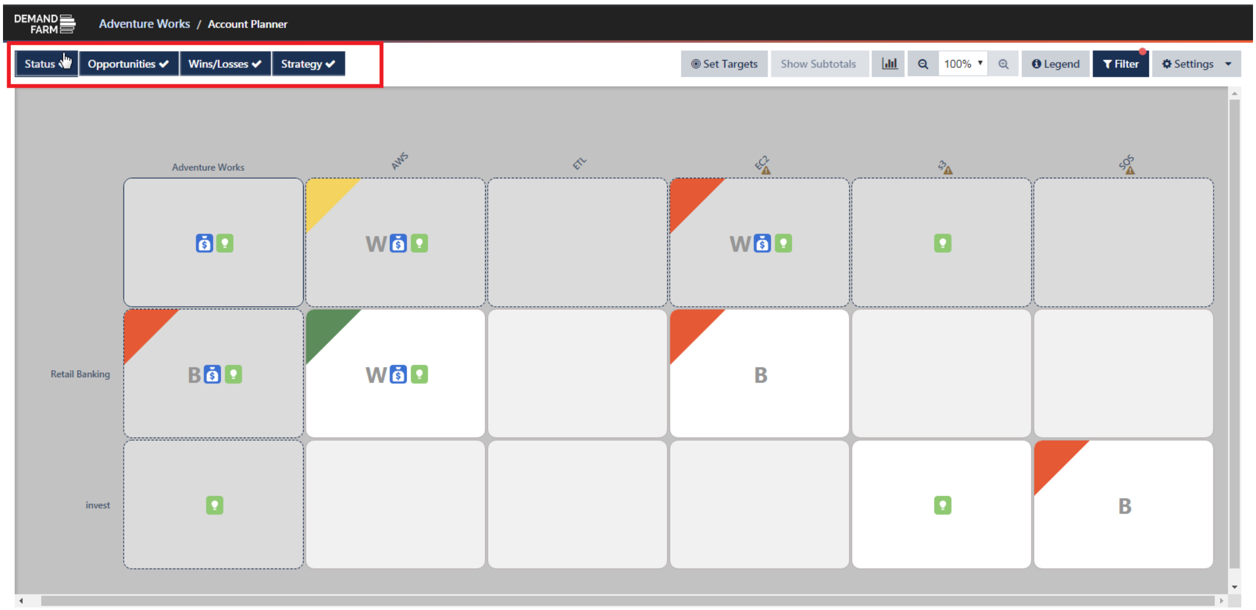


Account Planner View

The user can select 4 available views by drilling down to an individual cell on the Account Planner home page. The Account Planner view allows users to critically analyze a single ‘Buying Centre’ and ‘Offering’ combination based on the following criteria

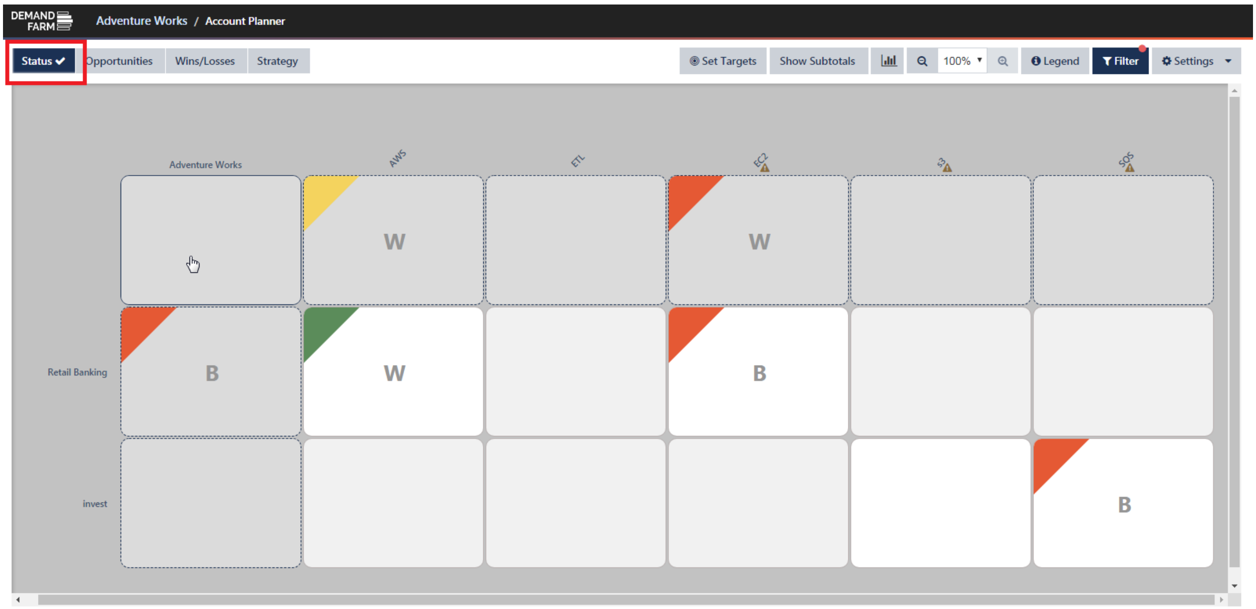
The user can able to see icons on the Account Planner overview when Status, Opportunity, Win/Loss and Strategy button is enabled

- **Status**
- **Pipeline values**
- **Wins/Losses**
- **Strategy**



Status

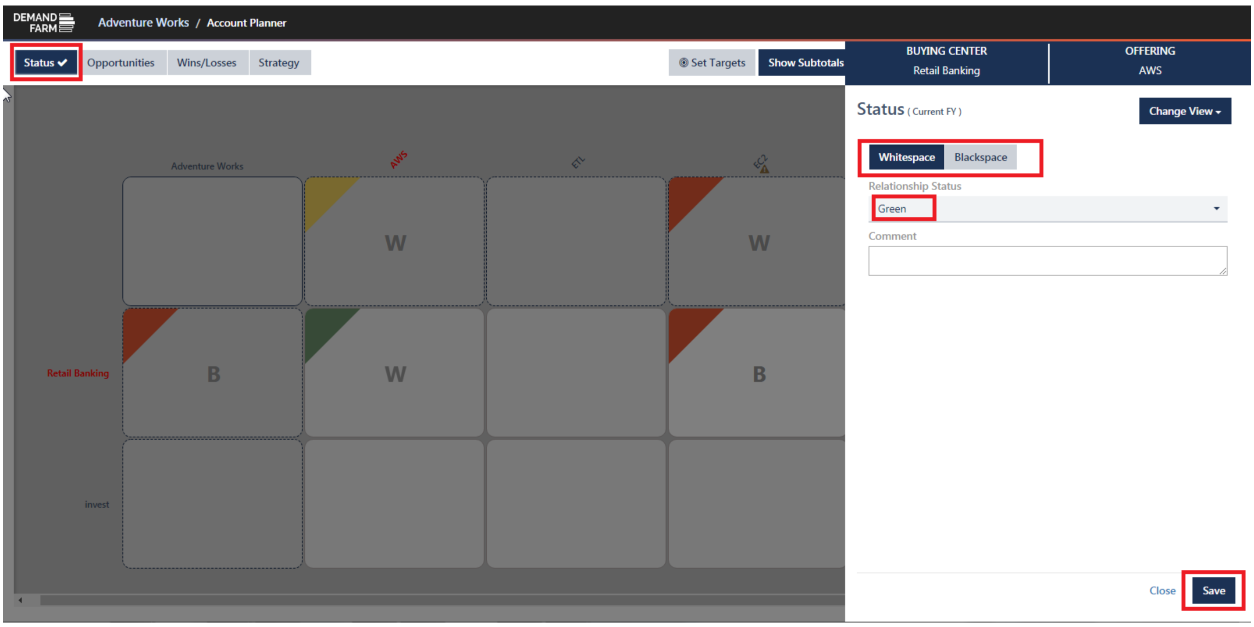
Click on the 'Status' button presents on the left-hand side of the Account Planner overview page as shown in figure



Attributes:

1. Relationship Status (Picklist)
2. Comment (Text)
3. Whitespace or Blackspace (Boolean)

By clicking on Buying center or offering or cell an aside form will open at right side to fill the Status form.

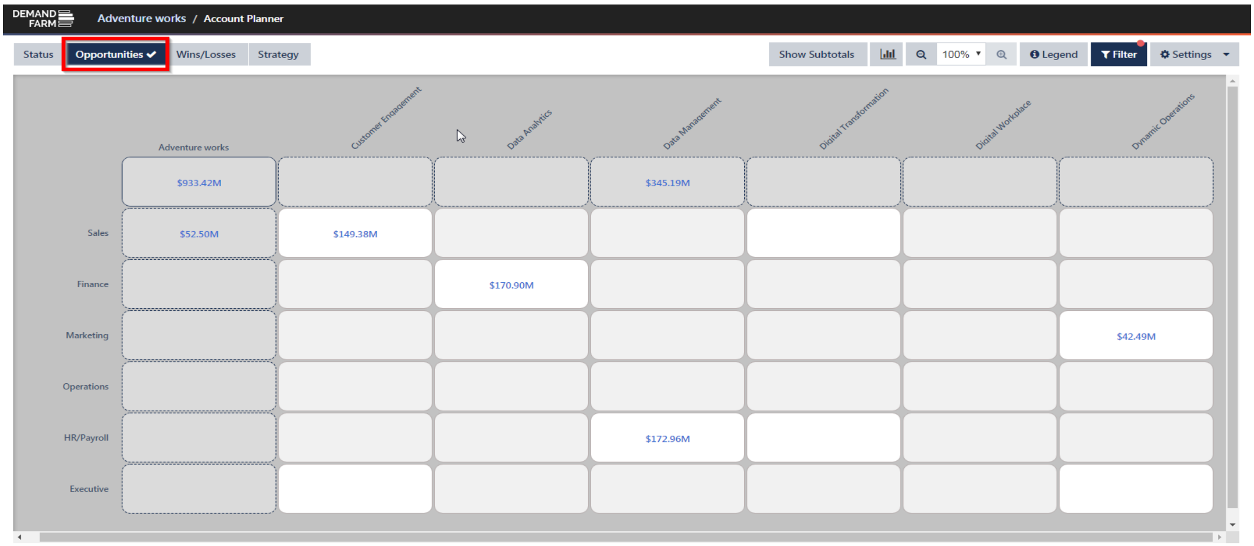


- Relationship Status can be entered at Buying Center, Offering or combination of both i.e. cell which indicate the relationship strength.
- Account Planner Box ribbon color come from defined Relationship Status picklist field value (Red, Green, Amber).

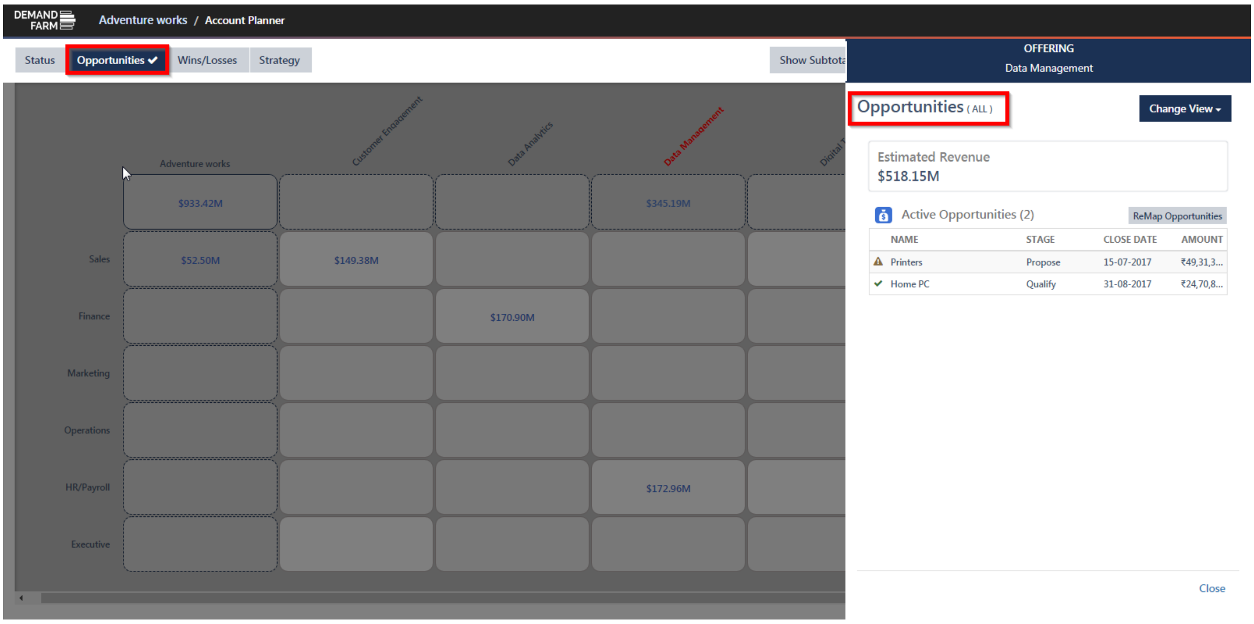
- Blackspace or Whitespace can be marked by user to indicate potential business.
- Comment is free text field for capturing description about cell.

Opportunities

Click on the '**Opportunities'** button presents on the left-hand side of the Account Planner overview page as shown in figure



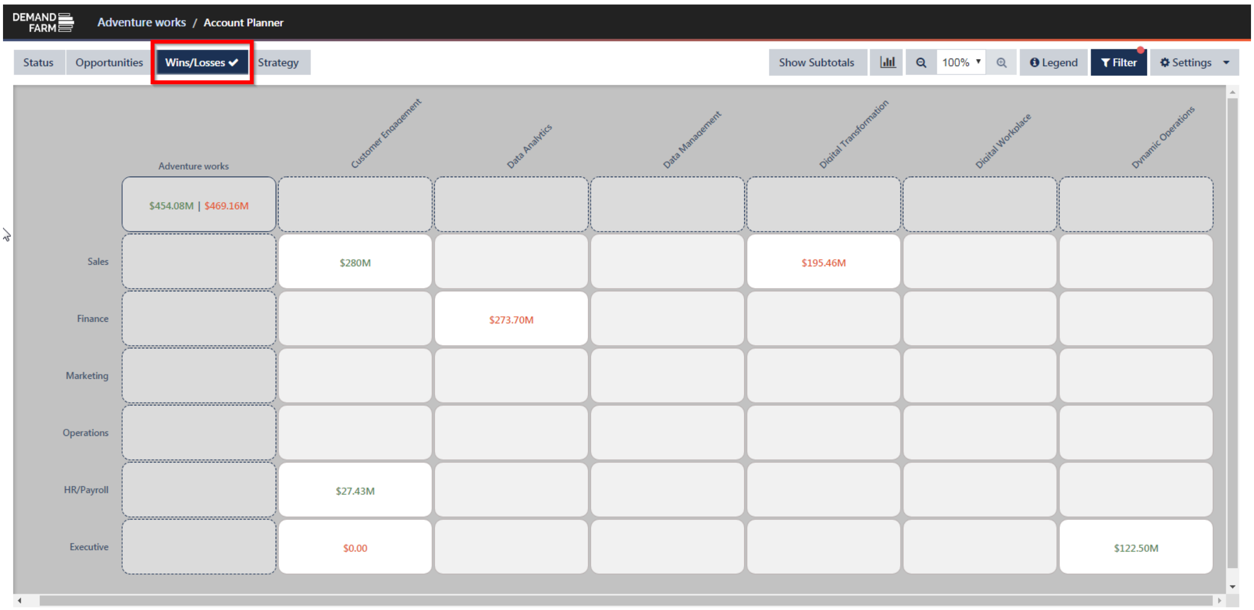
- Opportunity can be map at Buying Center, Offering or combination of both i.e. cell which indicate the Estimated revenue of the cell
- To see the 'Estimated revenue', users need to make sure that the opportunities present in Account Planner
- Estimated revenue displays the total Pipeline Revenue for that specific cell
- The account cell consists of
- Total Estimated revenue of the open opportunity



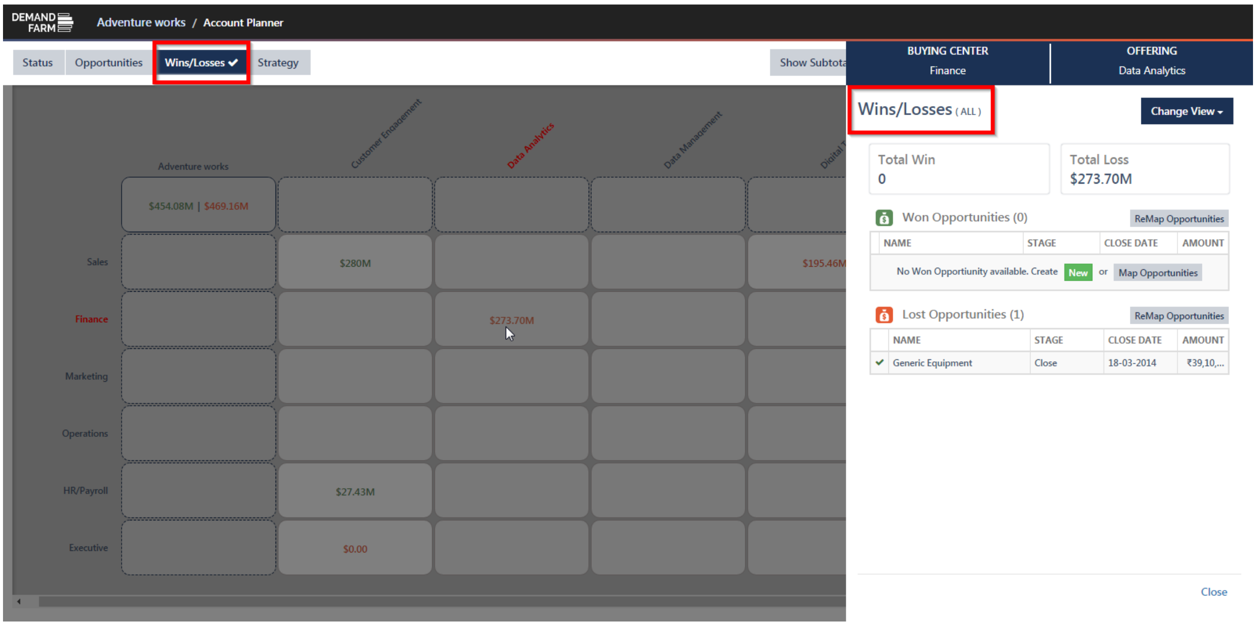
- For all view if no records available the aside view shows ‘new’ and ‘Map Opportunities’
- Click on any cell in the account planner view where opportunity already create the aside view of the account planner show the Estimated revenue and active opportunity list as per the screenshot

Wins/Losses

Click on the ‘Win/Losses’ button presents on the left-hand side of the Account Planner overview page as shown in figure



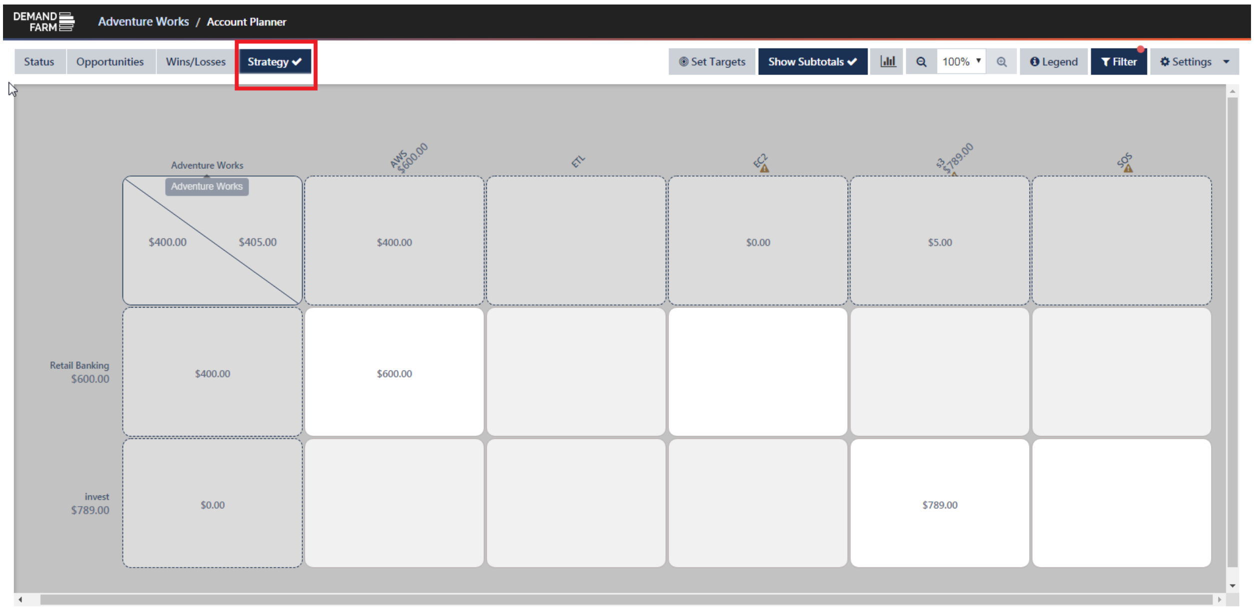
- Won Opportunity and Loss Opportunity can be map at Buying Center, Offering or combination of both i.e. cell which indicate the Estimated revenue of the cell
- To see the ‘Total win’ and ‘Total Loss’, users need to make sure that the opportunities present in Account Planner
- The Cell consists of ‘Total won ‘or ‘Total Loss amount’ of the opportunity or both
- The Account cell consists of ‘Total won ‘or ‘Total Loss amount’ of the opportunity



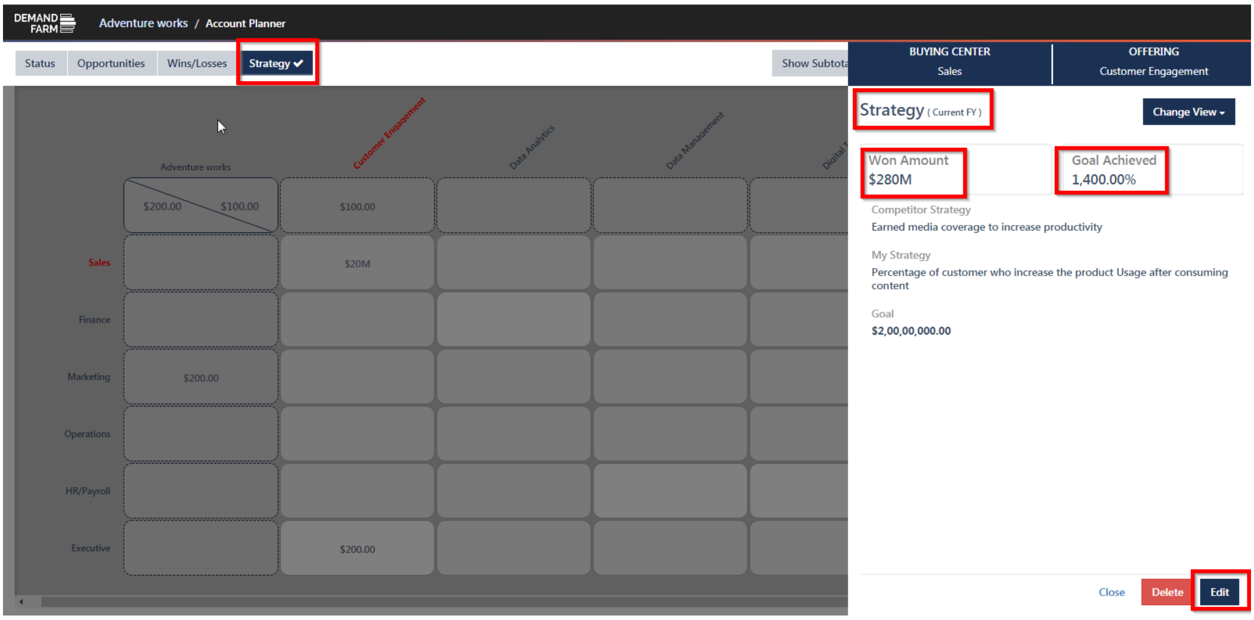
- Total Win displays the sum of the total ‘Won’ Opportunities
- Total Loss displays the sum of the total ‘Lost’ Opportunities
- Won Opportunities displays all the ‘Won’ opportunities for that cell
- Lost Opportunities displays all the ‘Lost’ opportunities for that cell

Strategy

Click on the ‘Strategy’ button presents on the left-hand side of the Account Planner overview page as shown in figure



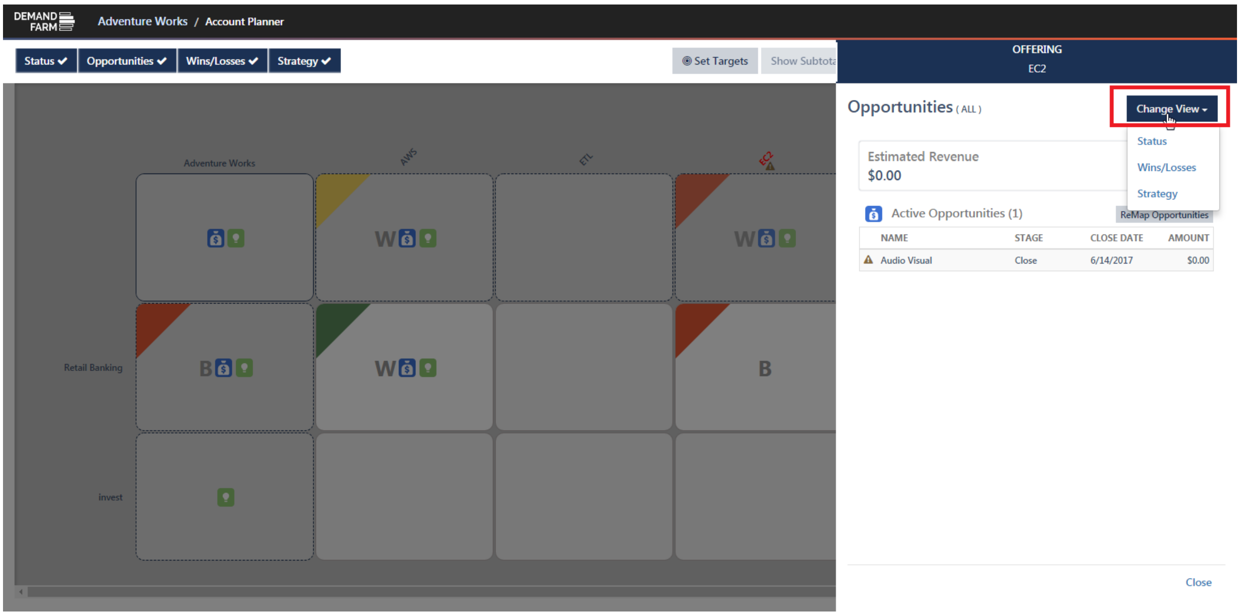
The Strategy section helps users define their Strategy as well as the identified Competitor Strategy for the selected cell or ‘Buying Centre’ & ‘Offering’ combination



- Click on any cell in the Account Planner view to create a 'Strategy'
- Users can define their Strategy as well as the identified Competitor Strategy for the selected cell
- Account cell consists 'Total buying center 'goal and 'Total offering' goal
- Click on cell where user defined strategy the aside view of the strategy shows the Won Amount and Goal Achieved in the form of percentage (%) for the Current FY
- User can edit the strategy as per shown in screenshot

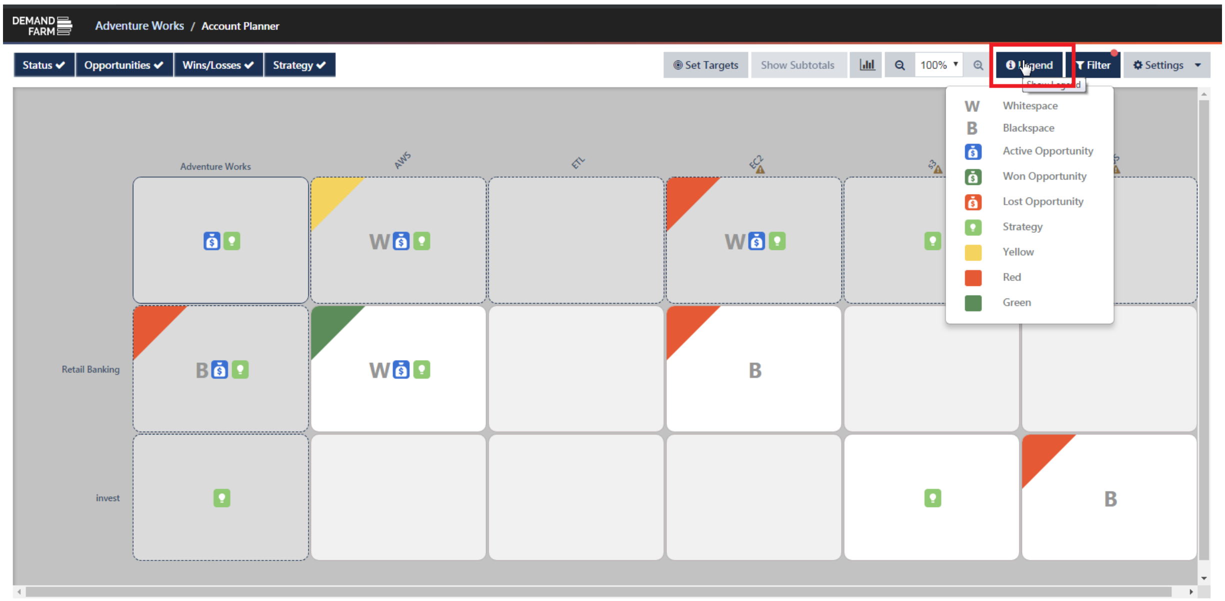
Change the View

The user can switch between the Views by using Change View Drop down present in the aside Panel



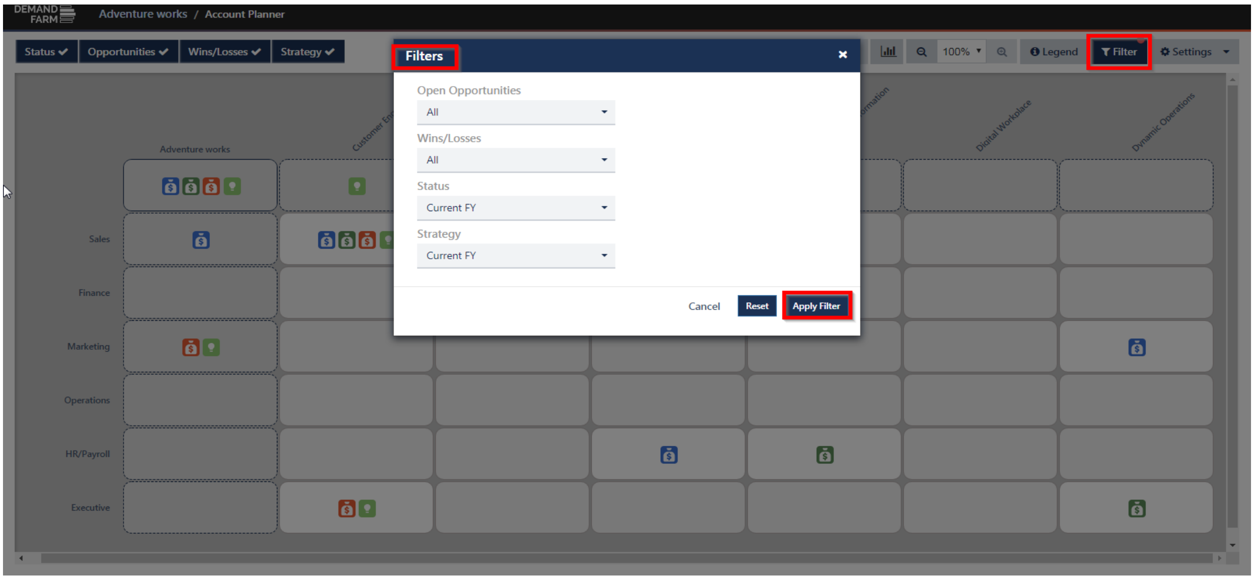
Legend

The Legends button helps users identify how each action is denoted once the Account Planner is completed and explains the color codes used in the application



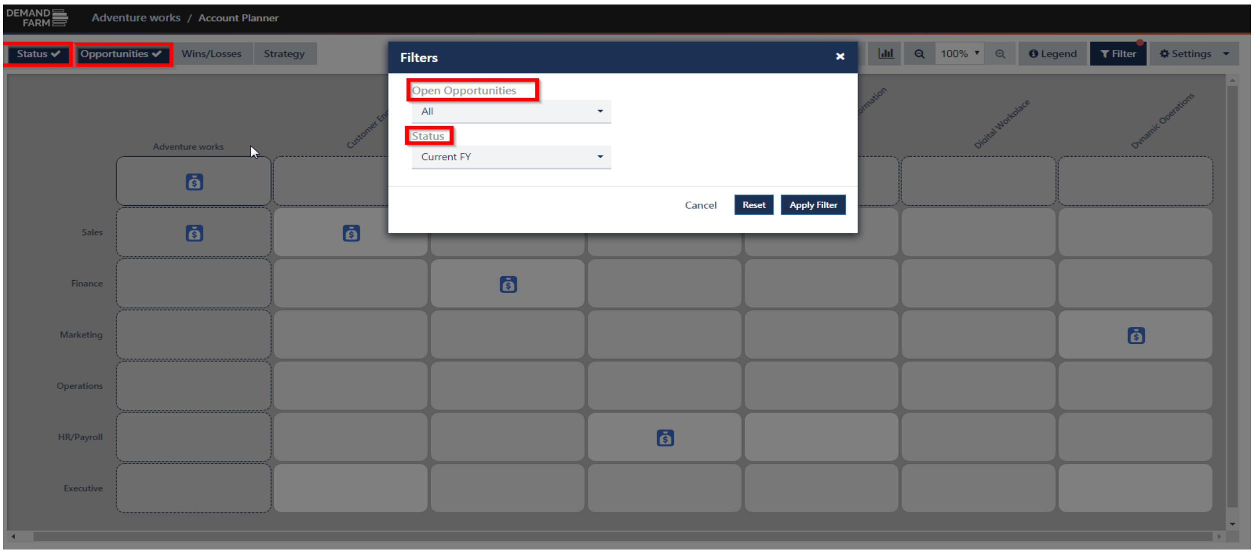
Filters

- Account Planner provide duration or time period filter for each view individually. User can choose or apply time period filter by clicking on “Filter” button. Based on selected filter Account Planner view get refreshed.

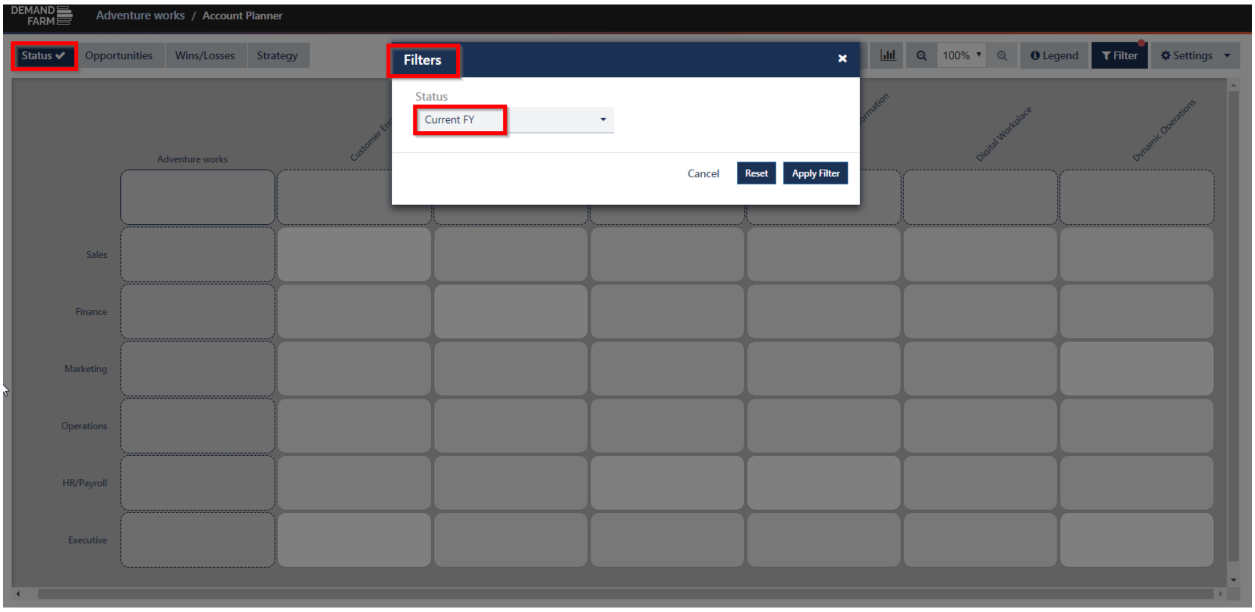


- Filter modal only show the filter option for selected Account Planner View. For example, if user selected “**Status**” and **“Opportunities”** view then he or she can only see the status and opportunities filters

- If No view is selected on Account Planner overview, then filter show “No view currently is Active. Select at least one view to apply filter”



Status View

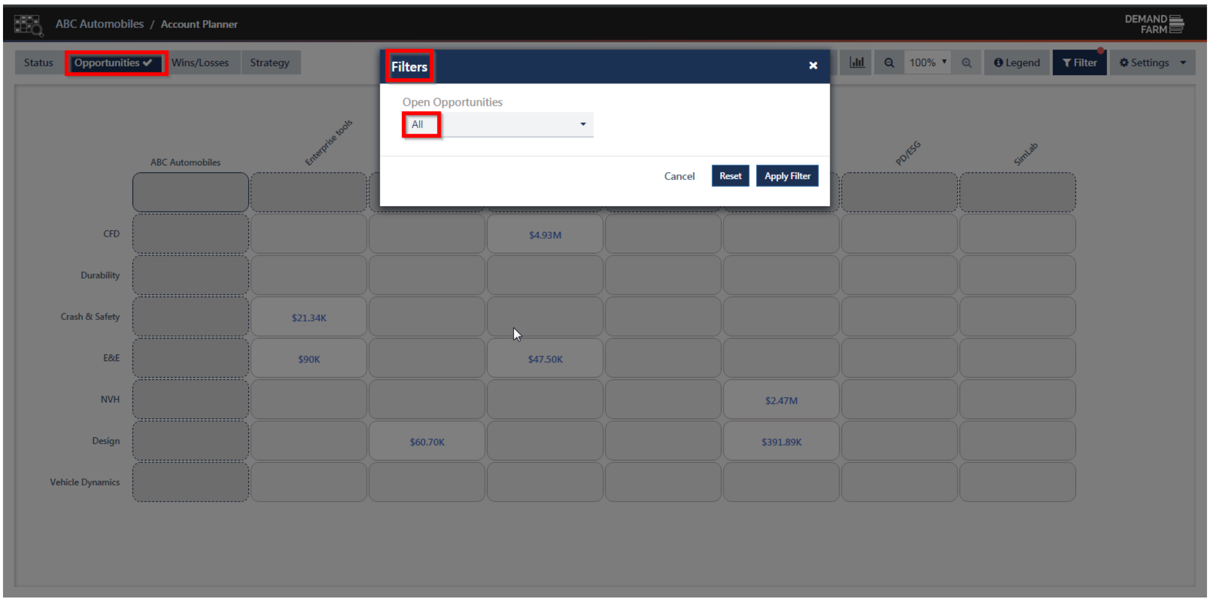


Permissible Filters: Current FY, Next FY and Last FY

Default Filter: Current FY

Result: Account Planner status view refreshed and show Status of the selected fiscal period

Opportunities View

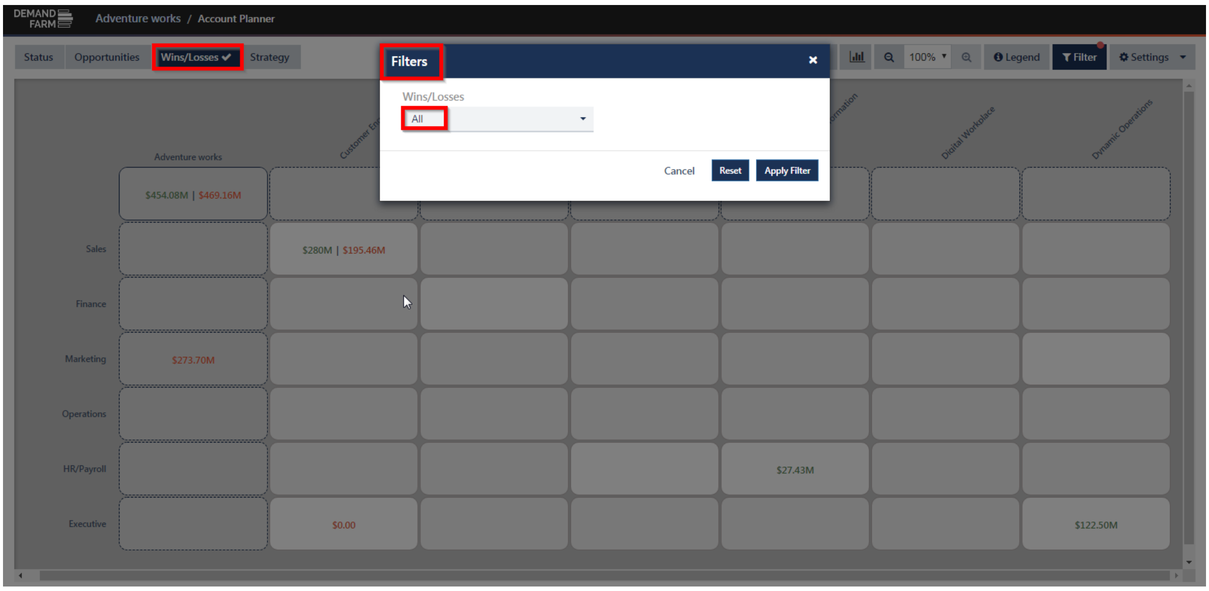


Permissible Filters: All, This Fiscal Period, Next Fiscal Period, Current FY, Last Fiscal Period, Next FY, Last FY, Last 2 FY, Next 2 FY, Custom Interval

Default Filter: All

Result: Account Planner Opportunities view refreshed and show Opportunities of the selected fiscal period

Wins/Losses View

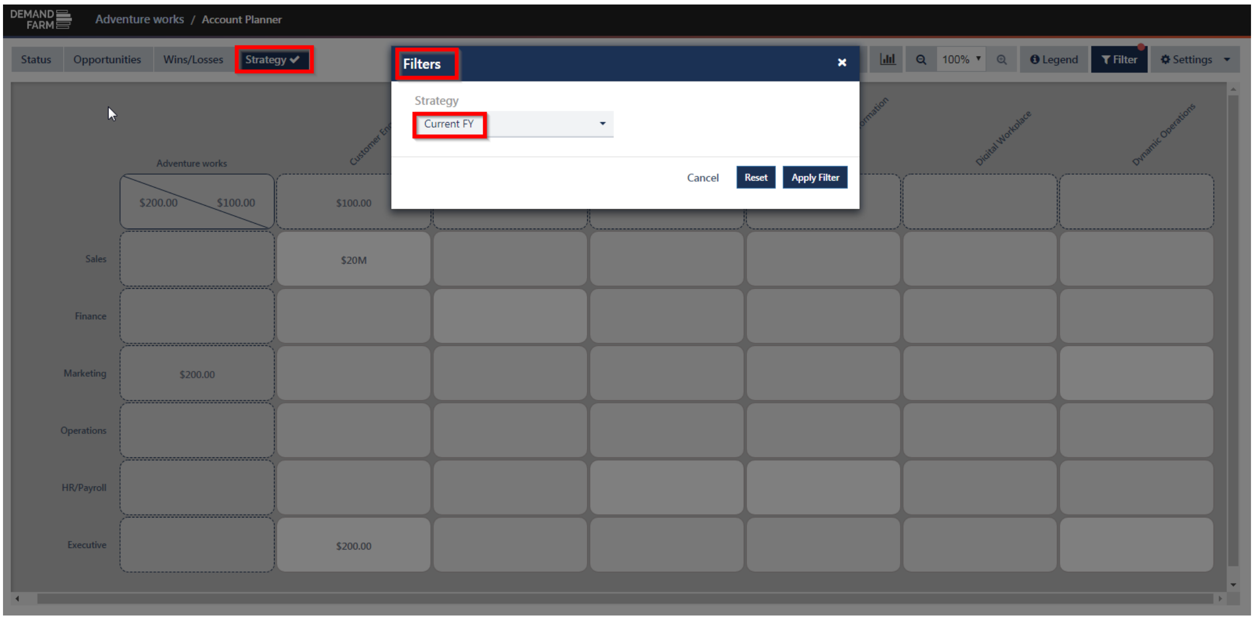


Permissible Filters: All, This Fiscal Period, Next Fiscal Period, Current FY, Last Fiscal Period, Next FY, Last FY, Last 2 FY, Next 2 FY, Custom Interval

Default Filter: Current FY

Result: Account Planner Won opportunity and loss opportunity view refreshed and show Won opportunity and loss opportunity of the selected fiscal period

Strategy View

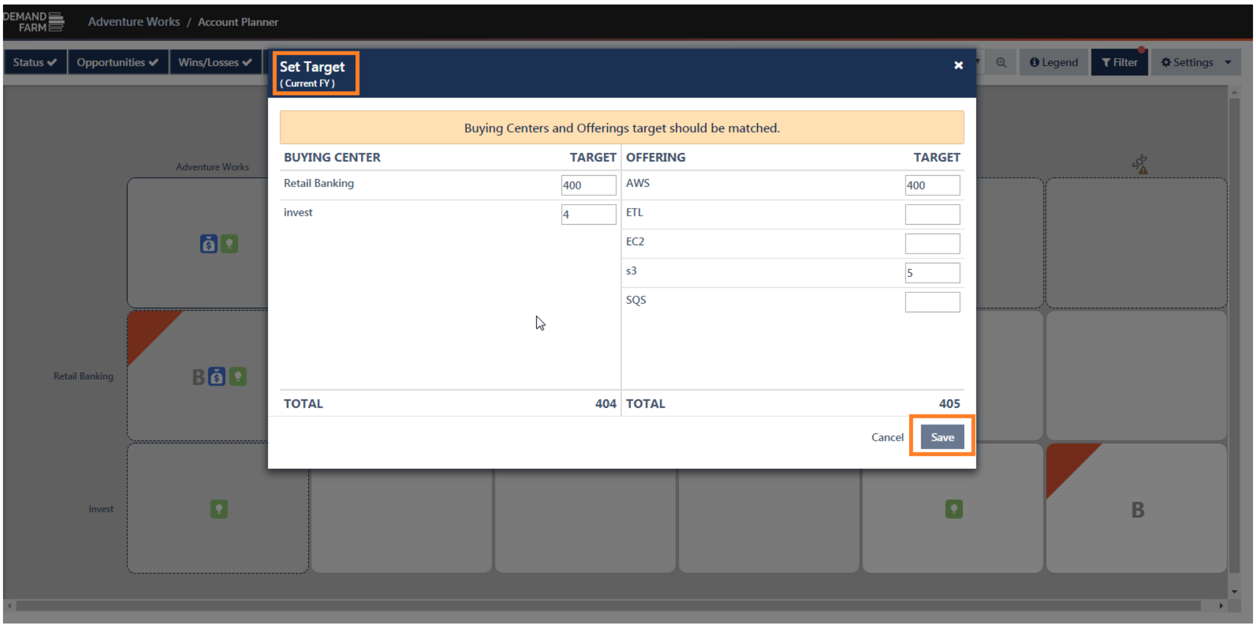


Permissible Filters: Current FY, Next FY and Last FY

Default Filter: Current FY

Result: Account Planner Strategy view refreshed and show Strategy of the selected fiscal period

Set Targets



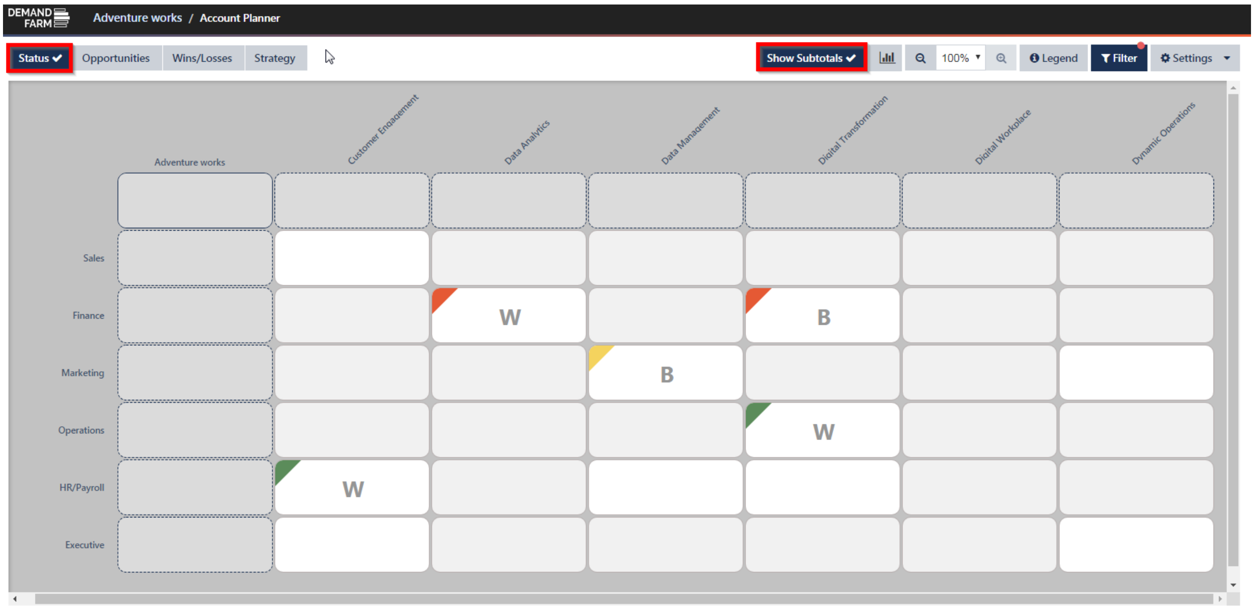
- The user can split Account target/goal across buying centers and Offerings for selected Fiscal year. The Buying center and Offering goal must match to each other
- User will get warning message if Buying center and Offering goal does not match

Show Subtotals

The user can see subtotal of Pipeline, Win and loss pipeline, target at buying center and offering level by clicking on ‘**Subtotal’** toggle button

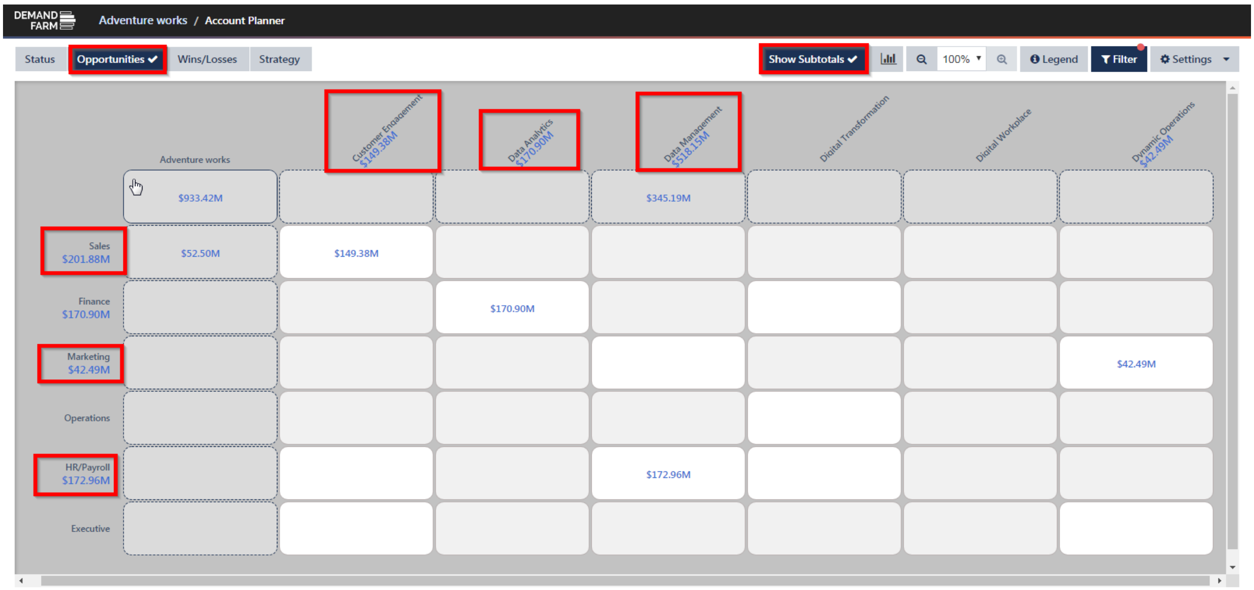
Status View

- There is no side effect of “Subtotal” toggle button on account planner status view



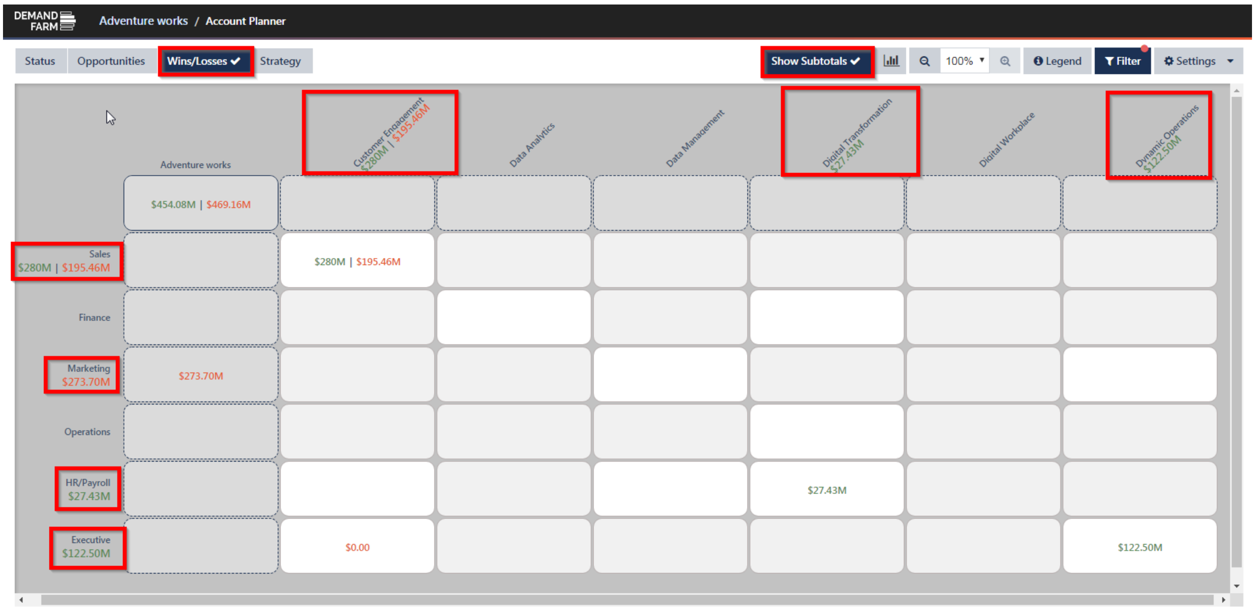
Opportunities View

- Show buying center and offering subtotal of open opportunities pipeline (Including all opportunities means mapped to Buying center only or Offering only or both)
- Show total open opportunities pipeline at top left corner cell (Including not mapped opportunities also)



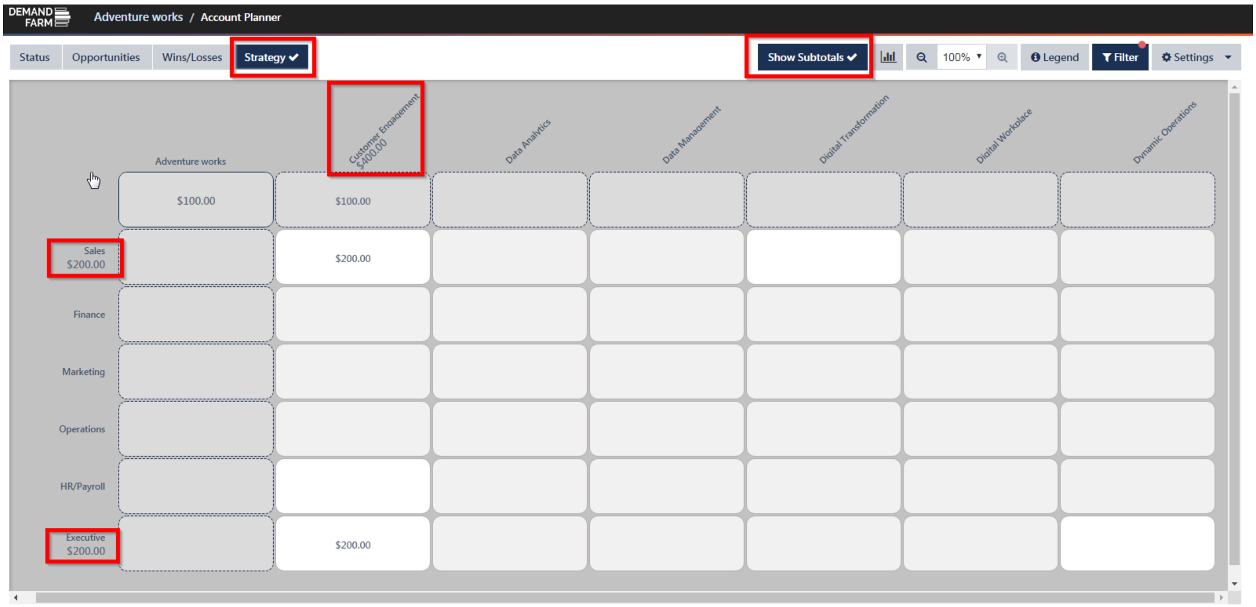
Win/Loss View

- Show buying center and offering subtotal of closed opportunities win and loss pipeline (Including all opportunities means mapped to Buying center only or Offering only or both)
- Show total closed opportunities win and loss pipeline at top left corner cell (Including not mapped opportunities also)



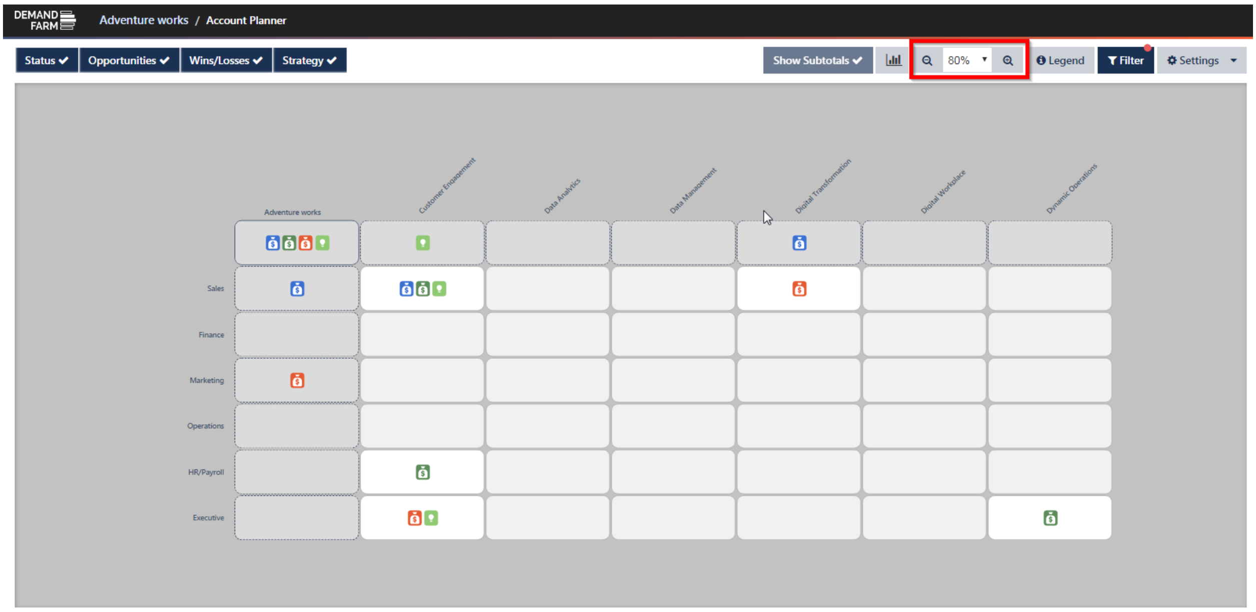
Strategy View

- Show total goal at Buying center and Offering level for buying center and offering combination (Exclude Buying center only goal and Offering only goal)



Zoom

- Use the magnifying glass to enlarge or minimize the Account Planner by varying specified size ratios (40%-100%)

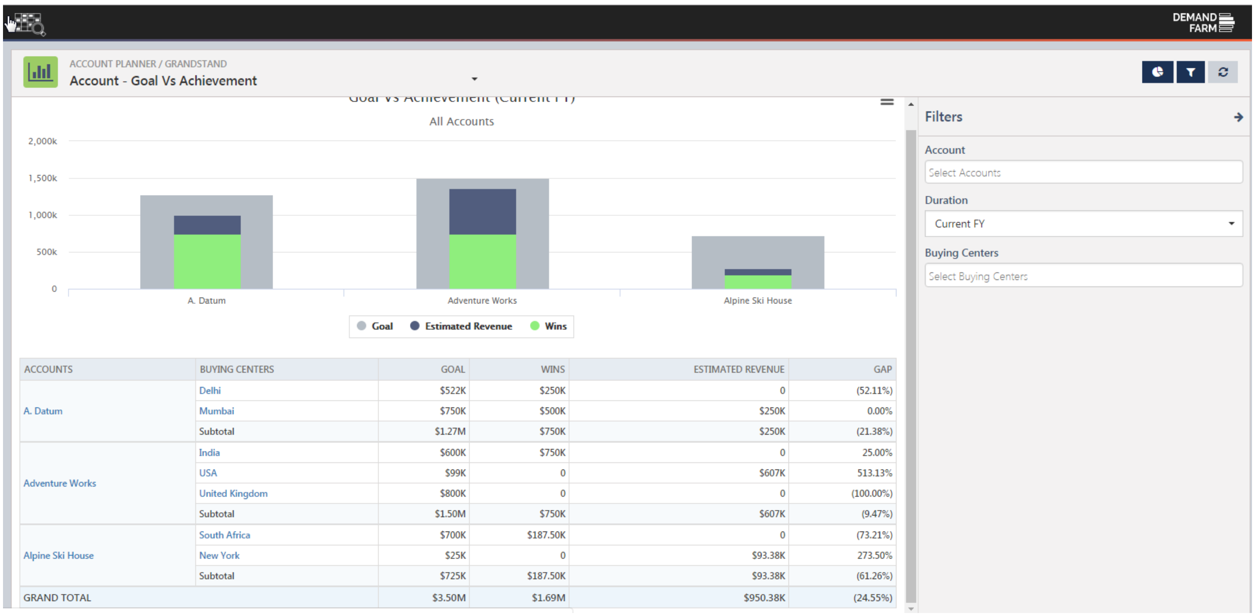


Grandstand

- It's graphical view & tabular view of Goals, Wins and Active Opportunities for Accounts, Buying centers and Offerings
- Grandstand for Account Planner has 2 reports:
    1. Account - Goal Vs Achievement
    2. Offering - Goal Vs Achievement

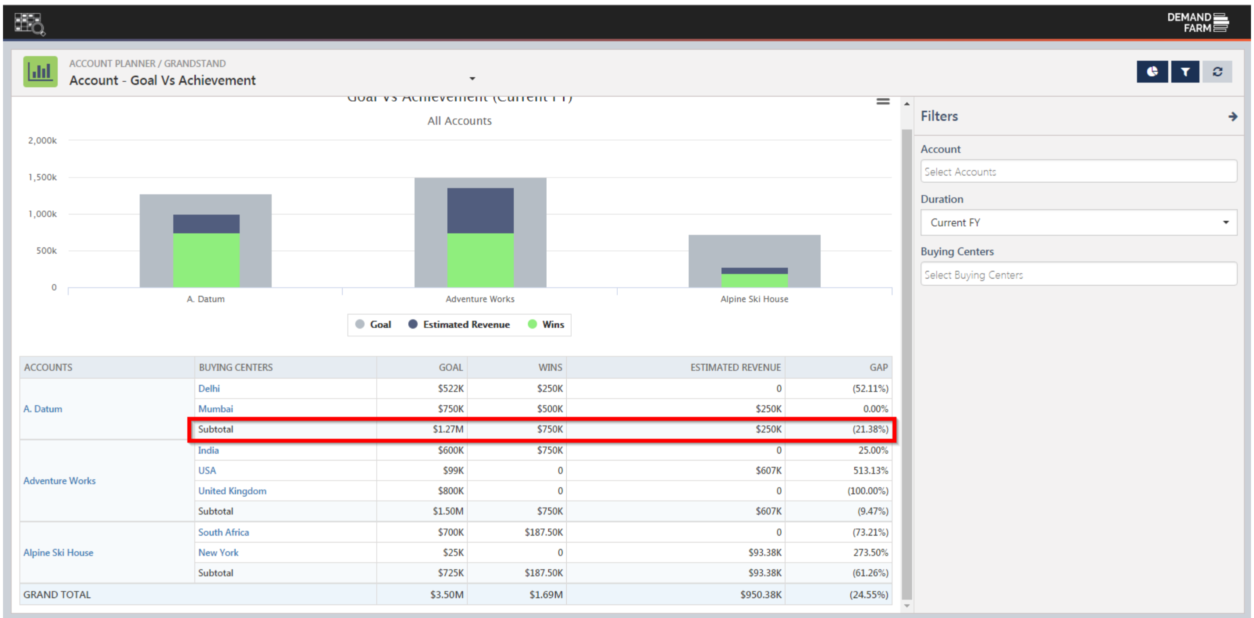
Account – Goal Vs Achievement

Account Goal Vs Achievement report is the graphical and tabular representation of Goal, Wins, Pipeline and Gap. It displays data Buying center wise Goals, Wins, Pipeline and Gap



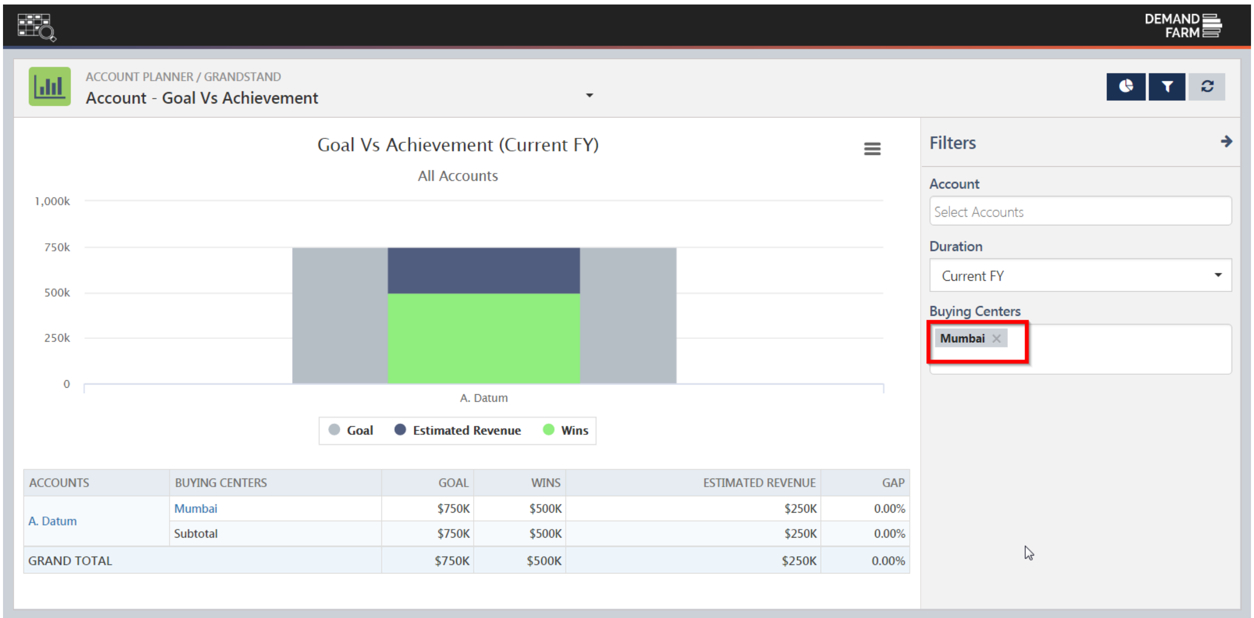
ACCOUNTS	BUYING CENTERS	GOAL	WINS	ESTIMATED REVENUE	GAP
A. Datum	Delhi	$522K	$250K	0	(52.11%)
	Mumbai	$750K	$500K	$250K	0.00%
	Subtotal	$1.27M	$750K	$250K	(21.38%)
Adventure Works	India	$600K	$750K	0	25.00%
	USA	$99K	0	$607K	513.13%
	United Kingdom	$800K	0	0	(100.00%)
	Subtotal	$1.50M	$750K	$607K	(9.47%)
Alpine Ski House	South Africa	$700K	$187.50K	0	(73.21%)
	New York	$25K	0	$93.38K	273.50%
	Subtotal	$725K	$187.50K	$93.38K	(61.26%)
GRAND TOTAL		$3.50M	$1.69M	$950.38K	(24.55%)

- It also represents Account wise subtotal for Goal, Wins, Pipeline and Gap.

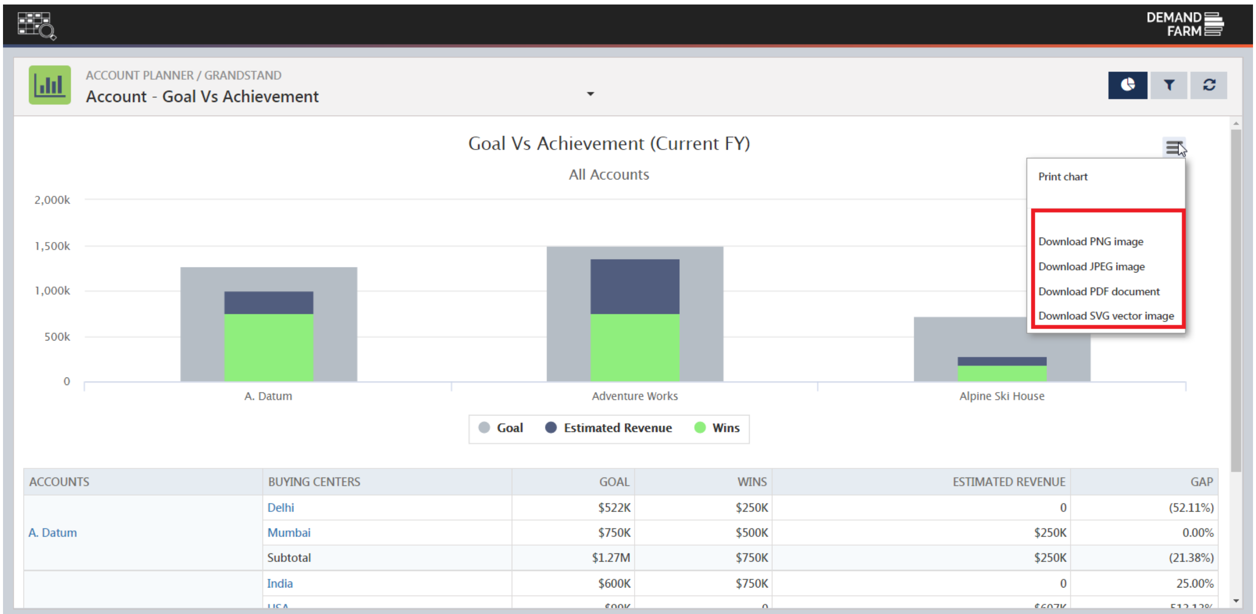


ACCOUNTS	BUYING CENTERS	GOAL	WINS	ESTIMATED REVENUE	GAP
A. Datum	Delhi	$522K	$250K	0	(52.11%)
	Mumbai	$750K	$500K	$250K	0.00%
	Subtotal	$1.27M	$750K	$250K	(21.38%)
Adventure Works	India	$600K	$750K	0	25.00%
	USA	$99K	0	$607K	513.13%
	United Kingdom	$800K	0	0	(100.00%)
	Subtotal	$1.50M	$750K	$607K	(9.47%)
Alpine Ski House	South Africa	$700K	$187.50K	0	(73.21%)
	New York	$25K	0	$93.38K	273.50%
	Subtotal	$725K	$187.50K	$93.38K	(61.26%)
GRAND TOTAL		$3.50M	$1.69M	$950.38K	(24.55%)

- Account graph can further be drilled down into Buying Center wise graph by clicking on an Account name in the graph



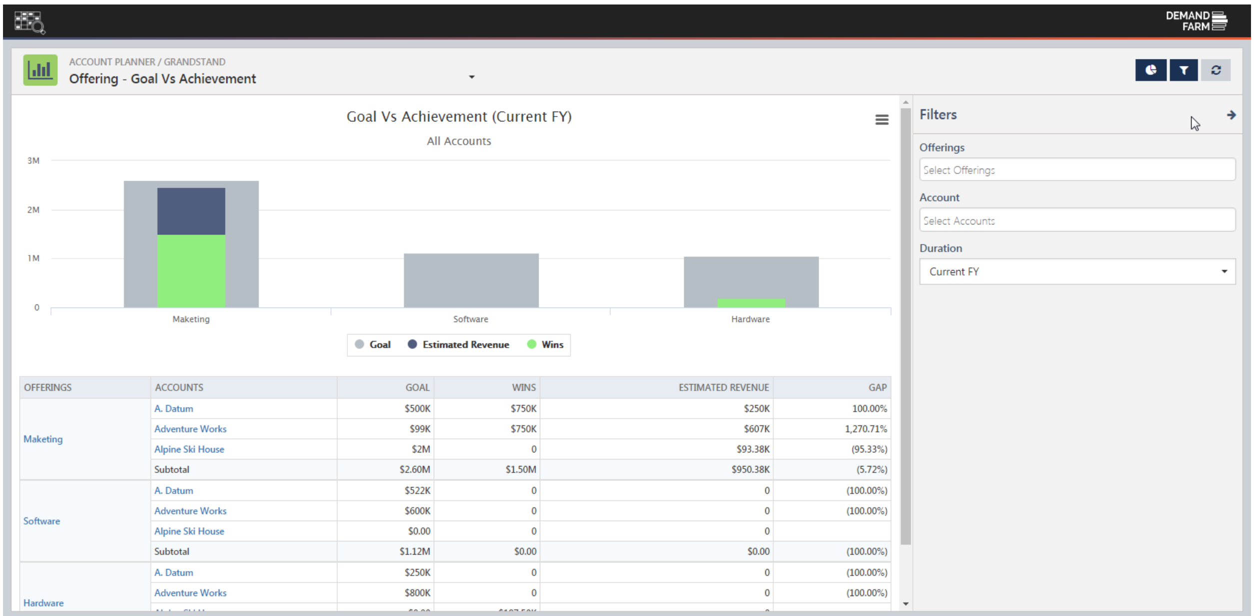
- User can download the chart in different formats as PNG image, JPEG image, PDF document and SVG vector image



- Default Current FY Duration filters for Account - Goal Vs Achievement report

Offering – Goal Vs Achievement

Offering Goal Vs Achievement report is the offering wise graphical and tabular representation of Goal, Wins, Pipeline and Gap



- It also represents the subtotal of offerings for Goal, Wins, Pipeline and Gap.
- Default Current FY Duration filters for Offering - Goal Vs Achievement report.