



***Equipment & Service Solutions***

*Sales Department*

**TARGET ACCOUNT PROGRAM**



- Qualification of Target Accounts
- Difference Between “Key” and “Target”
- The Planning Process
- Conclusion



# ***What Qualifies As A Target Account?***

- Account has at least 25 units in their fleet
- Account has not purchased KMH mobile equipment for at least 5 years
  - **and** -
- Account buys a large number of units every year, or will be in the market for a large purchase in the next 18 months
  - **or** -
- Account may not have plans to purchase, but rep feels they have a significant opportunity to reduce maintenance and downtime, or increase storage capability by updating fleet. Rep believes there is a reasonable chance of creating an opportunity in the next 18 months



# *What Qualifies As A Target Account?*

- These accounts would have a dramatic impact on the income of both the salesperson and the dealership in the time frame of 6 to 18 months
- Target competitor's long-standing accounts

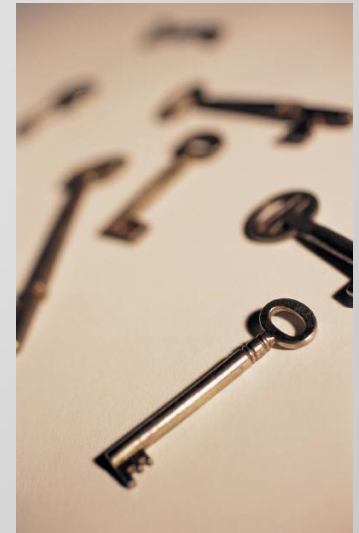


# *Other Important Accounts*

**The following are “A” or “Key Accounts”, not Target**

- Accounts not planning significant new equipment purchases over the next two years
- Large accounts which have recently entered into long term agreements, making expectations of significant business unrealistic for several years
- Accounts where reps are currently involved in some phase of the quoting process

Key Accounts do not fall under the full scope of target account planning, which requires the planning and involvement of the entire dealership



# *The Planning Process*

- Determine target accounts with sales manager
- Obtain target account binder from business development
- Assess the current situation
- Define the objective
- Create a strategy
- Develop a series of action steps



# ***Target Account Program Guide:***

- 1) Description of the Organization**
- 2) Account History**
- 3) Competition**
- 4) Contacts**
- 5) Short Term Goals**
- 6) Strategies/Action Plan**
- 7) Plan Presentation & Critique**



# ***1) Description of the Organization Includes:***

- Products Marketed
- Profile
- Corporate Headquarters
- Plant Locations
- Fleet Age/Size
- Own/Lease

The account's web site will be researched by business development and any information pertaining to the above will be included in this binder.



## ***2) Account History Includes:***

- **All past and current efforts relating to the account**
- Proposals for the account will be printed and included by sales administration.
- PowerPoint presentations will be printed and included by business development.
- Current Situation form to be completed by rep.



Target Account

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Arial 10 Wrap Text Merge & Center

A8 E-mail:

	A	B	C	D	E	F	G	H	I
1	<b>Target Account Assesment - Current Situation</b>								
2									
3	<b>KMH Rep:</b>								
4	<b>vCard:</b>								
5	<b>Name:</b>								
6	<b>Address:</b>								
7	<b>Phone:</b>								
8	<b>E-mail:</b>								
9	<b>Client History:</b>								
10									
11									
12									
13									
14									
15	<b>Current Activity:</b>								
16									
17									
18									
19									
20									
21	<b>Comptetive Influences (Name, Activities, Reputation):</b>								
22									
23									
24									
25									
26									
27	<b>Needs Analysis Review:</b>								
28									
29									
30									
31									
32									
33	<b>Describe relationship climate and Your Share of the Business:</b>								

Sheet1 Sheet2 Sheet3

Ready



### ***3) Competition Includes:***

- **Name competitors and what percentage of the business they have**

The rep will enter this information into the binder.



## ***4) Contacts Includes:***

- **Begin evolving list of individuals and include title, job function, business personality, impact on the buying process, and strength of rep's current relationship.**

As much information as possible will be gathered by business development and included in this section. The rep will enter the majority of contacts into the binder.



Target Account Contact Information - Microsoft								
Operations								
A	B	C	D	E	F	G	H	
1	<b>Major Account Contact Information:</b>					<b>Rating Scale:</b>		
2						5 - Advocate	2 - Won't Resist	
3	<b>Company:</b>					4 - Supportive	1 - Negative	
4						3 Accepting	0 - Antagonistic	
5	Title/Job Funtion	Contact Name	Personal Focus	Organizational Needs	Personal Needs	Impact H-M-L	Rating Scale	KMH Lead Contact
6	Operations							
7	Warehouse Manager							
8	Shipping Manager							
9	Receiving Manager							
10	Operations Manager							
11	Production Manager							
12	Logistics Manager							
13	Operator							
14	Operator							
15	Technician							
16								
17								
18								
19	Screeners							
20								
21								
22								
23								
24	Guide/Coach							
25								
26								
27								
28	Final Decision-Maker							
29								
30								
31								
32								
33								



## ***5) Short Term Goals Include:***

- **The rep will set a series of short-term goals/ objectives. Each must have a set time for completion. KMH recommends 2 months.**

These objectives must be measurable.

~~“I will get to know them better.”~~

“I will have completed an exploratory call with six contacts including the head of maintenance, a lift truck operator, the distribution manager, safety director, head of purchasing, and industrial engineer. I will determine each personality type and their key concerns. I will determine what process the company uses to make decisions.”

***Short Term Goals Include the most ambitious objectives the rep can realistically achieve***



## ***6) Strategies/Action Plan Includes:***

- **The strategy statement is a general description of how the rep will be proceeding toward the objective – usually 4 or 5 sentences.**

Seriously question continuing any approach that has been tried in the past with this account.

Rather than taking the normal path of immediately trying to obtain approval to provide a quote or demo, concentrate on the personal concerns of the buyers and the differences between KMH and competitors.



Target Account

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A2

	A	B	C	D	E	F	G	H	I
1	<b>Target Account Development - Action Steps</b>								
2									
3	<b>Target Account Plan For:</b>								
4									
5		<b>Objective:</b>							
6									
7									
8									
9									
10									
11	<b>Strategy:</b>								
12									
13									
14									
15									
16									
17	<b>Action Steps</b>								
18	<b>Date</b>	<b>#</b>	<b>Action Step Description</b>				<b>Results</b>		
19									
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Sheet1 Sheet2 Sheet3

Ready



Game Plan - Sales [Compatibility Mode]

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Clipboard Font Alignment Number

B3 Customer:

Day 1 Day 3 Day 4 Day 5 Day 7 Day 8 Day 10

1 **GAME PLAN**

2 **Action Item** **Person Responsible** **Resources** **Target Date** **Actual Completion Date**

3 Customer:

4  Spec Trucks Sales Rep Site Survey  
Appraiser's Report  
New Customer Form

5  Complete Dealer Capacity Request Form Sales Rep OEM Web Site

6  Send Special Pricing to OEM / e-mail copy to Ron Hobbs Sales Rep Special Pricing Order Form

7  Demo and Rental Trucks Sales Rep Demo Rental Form  
Survey - Forklift  
Survey - Order Picker

8

9

10  Contact vendors for material costs Sales Rep Vendor List

11

12

13

14  Complete Truck/Quote Order Form Sales Rep Quote/Order Form

15  Research Sales Rep/Admin OEM Web Site, OEM Product Library, Mktg. Library, Sales Manager, Cust. web site

16  Complete Proposal Format Checklist Sales Rep Checklist Form






17  Facility Tour Sales Rep Tour Request Form

18 Meet with Admin to discuss deadlines and Review Proposal

Game Plan

TARGET ACCOUNT PROGRAM



Game Plan - Systems Projects [Compatibility]							
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Clipboard Font Alignment Number							
D24 Admin							
A		B		C		D	
1				Systems Projects			
2		Action Item		Person Responsible	Resources (all forms can be found in the shared Sales folder)	Target Date	Completion Date (✓)
3		<input checked="" type="checkbox"/> Account Mgr. schedules meeting with Sales Mgr. for initial review of applicable action items on this game plan		Account Mgr			
4		<input checked="" type="checkbox"/> Sales Manager and Systems Supervisor Review Application and Sales Engineer is assigned		Sales Mgr/ Systems Supv			
5		<input checked="" type="checkbox"/> Project Workbook is initiated		Account Mgr	Project Workbook to be located on server with path listed here		
6		<input type="checkbox"/> Budget Quotation <input type="checkbox"/> Hard Quote & Proposal					
7		<input type="checkbox"/> Engineering Study <input type="checkbox"/> Eng. Hrs only					
8		<input type="checkbox"/> Concept <input type="checkbox"/> AutoCAD Drawing					
9		<input type="checkbox"/> Installation Only					
10		<input checked="" type="checkbox"/> Acct. Mgr. and Sales Eng. meet to discuss Game Plan, responsibility division and commission split		Account Mgr/ Sales Eng			
11		<input checked="" type="checkbox"/> Game Plan & split presented to Sales Manager for acceptance/modification		Account Mgr/ Sales Eng			
12		<input checked="" type="checkbox"/> Relationship Management <input type="checkbox"/> Lunch/ Dinner <input type="checkbox"/> Other		Account Mgr/ Sales Mgr/			
13		<input checked="" type="checkbox"/> Project Timeline developed & copied to Sales Mgr/Sys Supv/Acct Mgr/Sales Eng/Admin		Acct Mgr/Sales Eng/Admin	 		
14		<input checked="" type="checkbox"/> Site Survey		Account Mgr/ Sales Eng	Operational Audit Forms		
15		<input checked="" type="checkbox"/> Contact vendors for material costs		Sales Engineer			
16							
17							
18							
19		<input type="checkbox"/> Research		Account Mgr/ Sales Eng/	Marketing Library Sales Manager Customer web site		



Game Plan - Sales [Compatibility Mode]

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B3 Customer:

Day 1 Day 3 Day 4 Day 5 Day 7 Day 8 Day 10

1 **GAME PLAN**

2	Action Item	Person Responsible	Resources (all forms will be found collectively in the "Game Plan Links" file or separately in the shared Sales folder)	Target Date	Actual Completion Date
3	Customer:				
4	<input type="checkbox"/> Spec Trucks	Sales Rep	Site Survey Appraiser's Report New Customer Form		
5	<input type="checkbox"/> Complete Dealer Capacity Request Form	Sales Rep	OEM Web Site		
6	<input type="checkbox"/> Send Special Pricing to OEM (e-mail only to Bob Hobbs)	Sales Rep	Special Pricing Order Form		
7	<input type="checkbox"/> Demo and Rental Trucks	Sales Rep	Demo Rental Form Survey Request Form Survey Order Picker		
8	<input type="checkbox"/> Contact vendors for material costs	Sales Rep	Vendor List		
9	<input type="checkbox"/> Complete Truck/Quote Order Form	Sales Rep	Quote/Order Form		
10	<input type="checkbox"/> Research	Sales Rep/ Admin	OEM Web Site, OEM Product Library, Mktg. Library, Sales Manager, Cust. web site		
11	<input type="checkbox"/> Complete Proposal Format Checklist	Sales Rep	Checklist Form		
12	<input type="checkbox"/> Facility Tour	Sales Rep	Tour Request Form		
13	Meet with Admin to discuss deadlines and	Sales Rep/	Review Proposal		

**Access to each one of the forms utilized in this game plan can be found on the F Drive as well as Team KMH site.**



## ***7) Plan Presentation & Critique Includes:***

- Group planning sessions are a major part of each monthly sales meeting.
- Reminders are included in the sales meeting agenda sent by the sales manager prior to each meeting.
- An assessment and objective for one of the rep's target accounts must be developed and brought to the meeting with the binder.
- The sales meeting should begin with the target account planning session while everyone is still awake.



## ***7) Plan Presentation & Critique Includes:***

- The sales manager should break everyone into groups of three or four.
- Aftermarket and Systems should be teamed with those whom they share the account and included in this first step of the brainstorming process. This step should take no more than 20 minutes per rep.



## ***7) Plan Presentation & Critique Includes:***

- The equipment rep begins the process by sharing the assessment and objective for his selected account.
  - Discussion: Is the objective appropriate, realistic, and ambitious?
  - Group agrees upon objective
  - Best possible strategy is developed
  - Action steps to implement the strategy are outlined
- Adequate notes should be taken by the rep in order to make an informal presentation to be critiqued by the entire sales force and any other managers that are invited.

***20  
Minutes  
Per Rep***

***Do Not  
Take a Break  
Before  
Presentations***



## ***7) Plan Presentation & Critique Includes:***

- Sales manager may choose to divide the entire group into two groups, or have each rep present to the entire group.
- Generally 5 or 6 plans can be critiqued in 2 hours.
- Interdepartmental cooperation should be strongly encouraged during this session – invite other managers and get some buy-in into the target account process in general.
- Reps should take notes of the group's review.
- Each rep should prepare a final written plan that includes detailed action steps – same day.

***2-Hour  
Period***



- Develop a total of 5 target accounts
- The plan must be written down by the sales rep and continuously updated – even outside the group sessions
- Each account that hasn't been conquered should be rotated through the group sessions every 5 months
- Focus on interpersonal selling rather than solution selling
- Involve as many members of the manufacturer and distributor selling team as possible!





*TARGET ACCOUNT PROGRAM*

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