

Target Account Progress Tracker

Target Account	Account Manager
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Account Manager's Next Step	Projected completion date	Actual completion date	Some ideas for Next Step
			<p>Approach</p> <ul style="list-style-type: none"> • Qualify this Target against Ideal Customer Profile • Research Target to prepare for initial approach and Needs Analysis • Stand Out, get attention and establish credibility • Go for Depth of Contact: Decide which Decision-Influencer to approach first • Develop Valid Business Reason and Contract to align expectations
			<p>Define</p> <ul style="list-style-type: none"> • Build Trust and demonstrate Value • Prepare Needs Analysis topics and/or questions • Contract process and discuss capabilities on initial call • Conduct Hourglass Needs Analysis • Complete follow-up Needs Analysis to ask further questions, if necessary • Complete additional Needs Analysis appointment with another Decision-Influencer, if desirable • Prepare Needs Analysis Record; confirm Assignment with prospect
			<p>Solve</p> <ul style="list-style-type: none"> • Do further research (secondary sources) on needs or possible solutions • Facilitate Brainstorming session • Develop Preliminary Ideas, float Trial Balloons, obtain prospect input/direction • Obtain support from other vendors involved
			<p>Confirm</p> <ul style="list-style-type: none"> • Refine idea/concept and obtain prospect acceptance • Explore/contract dollar amount and prospects expectations of results or return on investment • Develop full Buyable Solution, with further prospect input, of course • Present No-Surprise Proposal, obtain final confirmation
			<p>Deliver</p> <ul style="list-style-type: none"> • Oversee implementation of solution with client • Conduct final evaluation with client; start discussions of next project