



ACCOUNT RESEARCH

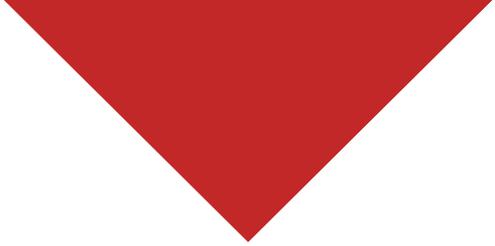
WHAT SHOULD BE COVERED?

WHITEPAPER

Sales Team Services



VIEWPOINT ANALYSIS



ACCOUNT RESEARCH WHAT SHOULD BE COVERED?

Your key accounts, whether they are existing customers or net new name targets, are a very particular animal. In some cases, the account lead tasked with fostering the relationship will only have one or perhaps a handful of accounts to manage. Marketing plans will be specifically drawn up. Pre-sales resources will be allocated. The company diverts investment, time, and effort to do all it can to either expand the current relationship and spend, or break down the door of that crucial new account.

However, all of the investment can be wasted unless it is paired with an appropriate investment in **understanding the business** that is being targeted. Account Research is absolutely fundamental to success in major accounts - in this whitepaper we discuss the key areas that need to be covered to gain a comprehensive view of the customer, their situation, and your key messaging.

Company Background

What does the company do? How big are they? Where are they based? When is their financial year-end? And more. It's important to provide the basics as they underpin the rest of the report.

Company Strategy & Latest Developments

What are they aiming to do in the market and how will they do it? How does their strategy impact the products or services that you sell? For example, if you sell data technology, do they talk about data as a strategic imperative? How is the business performing? What risks and opportunities do they talk to? Have there been any recent developments or major acquisitions perhaps?

Who Do You Need To Market To?

We suggest breaking this down into a number of different groups. For example, who are the executives - the decision-makers that you need to deliver strategic messages to? Who is the core team that you know will be interested in your product or services? Where are there other teams that are not obvious - but could be extremely interested in what you have to say and what you have to sell?



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What Technology Do They Already Use?

As you research the business and as you research the key personnel, try to find out what technology providers they use. This will help the sales team and the marketing team to understand what they will likely need to hear and what will interest them.

Which Partners Are Engaged?

Which of your competitors or partner businesses are coming up in your research? Might they be able to help you? If they are partners, can they provide more information for you? If they are competitors, who are they likely to be connected to, and does this change your marketing and sales messaging?

What Terminology Do They Use?

Do they use any specific terminology - maybe words or phrases that are important to the industry in which they work? Or maybe internal language that they use? For example, some companies have specific words for their employees, and most companies have a range of acronyms that they use. If you can find this through your research, it will obviously be beneficial in your customer communications.

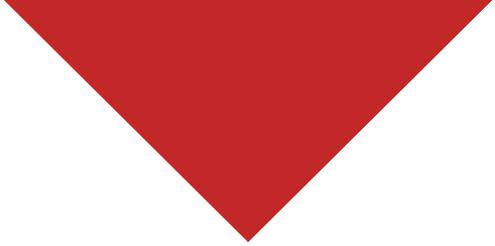
Interviews and Press

Have they issued any press releases? Have they conducted interviews or case studies? Have they presented at trade shows? If so, what did they say? What language did they use?

Suggested Messaging

Based on your extensive research - can you tie the information you have gathered with the product or service that your company sells? Can you think about the messaging that you might want to use? Can you offer some suggestions to the marketing team that may make a big difference when communicating with the customer's team?





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In Summary

Researching target accounts is an investment of time and money - but without it, your whole sales strategy will perform poorly. Having the right sales team, marketing resources, pre-sales investment, etc, can only perform provided they are focused on how they message, who they message and with **what** message.

How Can We Help You?

We research accounts for a number of well-known technology businesses. For more information about how Sales Team Services prepare Account Research and our services in this area, take a look at www.salesteamservices.com/account-research

We provide three variations:

- Key Account / Target Account Research
- Quickstart Account or Territory Profiling
- Account Based Marketing Research

If you would like to see an example of our research, please email us at contactus@viewpointanalysis.com and we will be happy to send you a redacted example.

Sales Team Services



WHO ARE WE? SALES TEAM SERVICES....

Sales Team Services is part of Viewpoint Analysis. We are focused upon helping sales teams to improve win rates and to cover all their blind spots.

We offer a range of services for sales and marketing leaders. They include:

- Baseline Service
- Loss Analysis
- Account Research
- Market Research
- Competitor Head-to-Head Comparisons
- Sales Team Analysis
- ABM Company Profiles
- Sales Troubleshooting
- Ideas Generation

Just let us know how we can help.

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