Our Account Strategy

Use this tool to collaborate on and document information about the client and our Account Plan. (Note that this worksheet mirrors the Steelcase Account Strategy template in Salesforce. Ensure that your plan is accessible to your team in Salesforce.)

Be sure to review and update your Account Plan at least once each quarter.

Information

Sources: Organization's website, organization's public filings (including annual report, letters to shareholders), Google News searches, Yahoo Finance, financial and investment press.

Account:	
Time period for this Plan:	
Strategy owner:	

About the Client

Overview, Current Account Situation *(Who they are, what they do, our history with them)*

Their key goals + priorities related to space:

Key client locations:

Our key contacts (name, title, location):

How does the client purchase?

How they buy: Major projects *(Describe the client's purchasing process for major projects)*

How they buy: Day-to-day *(Describe the client's purchasing process for day-to-day needs)*

Competitive threats, competitors selling to this client:

Our Account Strategy

Our Strategy: How can we help them achieve their goal?

How will we grow relationships and create new relationships?

What recurring touchpoints or programs will we leverage throughout the Plan period?
(e.g. Quarterly Business Reviews, Contract, Continuing CDA, rebates, Environmental or other reporting)

For help or questions: salescoach@steelcase.com

Our key Q1 initiatives | January - March

What we will do

How, who and when

What we will do

How, who and when

What we will do

How, who and when

Our key Q2 initiatives | April - June

What we will do

How, who and when

What we will do

How, who and when

What we will do

How, who and when

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Our key Q3 initiatives | July - September

What we will do

How, who and when

What we will do

How, who and when

What we will do

How, who and when

Our key Q4 initiatives | October - December

What we will do

How, who and when

What we will do

How, who and when

What we will do

How, who and when

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Account Strategy | Best practices to advance an existing client relationship

We need to:	Steelcase account strategy best practices:
Develop a plan for the client relationship	☐ Build an account strategy, record it in Salesforce, update it quarterly. Supporting tools: ☐ Use the Team Strategy Session tool to align with your Steelcase + dealer team that work on the client with you. ☐ Research the client. ☐ Use ARC's Work Experience Model to develop a strategy around your client's business objectives.
Maintain and build our existing relationships.	☐ Initiate Quarterly Business Reviews (QBRs); support available via Digital Front Door. ☐ Invite the client to visit the WorkLife. ☐ Invite the client to meet us in Grand Rapids or a different WorkLife. ☐ Connect our senior contact with your BGVP or with a member of the SET. ☐ Present our latest workplace research to the client and encourage our contacts to invite their peers from other teams. ☐ Provide a Steelcase + partners product update. ☐ Introduce the client to studio b, even if there is no current need for a custom solution.
Meet new people, build new relationships.	☐ Present our latest workplace research to the client and encourage our contacts to invite their peers from other teams. ☐ Propose a meeting with the client's ESG team to share our People + Planet story. ☐ Present Environmental Metrics reporting to the client. ☐ Use the People + Place workshop (WT+R) in order to connect with HR leadership. ☐ Use the Discovery Exercise workshop (WT+R) to meet and connect with leaders from across the client organization. ☐ Meet with the client's A+D firm to brainstorm ways to jointly support our shared client. ☐ Meet with the client's Commercial Real Estate firm to brainstorm ways to jointly support our shared client.
Uncover (or create) new opportunities.	☐ Ask! ☐ Initiate Quarterly Business Reviews (QBRs). Support available from the Sales Excellence Network; see Digital Front Door or Salesforce. ☐ Propose a Pilot Experience to engage with the client very early in the opportunity – or use a Pilot to create an opportunity. ☐ Review your Continuing CDA for products or product categories that are not included; negotiate to include additional product in your CDA.
Deepen our commercial relationship with the client.	☐ If we have a CDA but no contract/agreement, propose a contract. ☐ If the client uses a GPO, develop a LOU to drive more loyalty to Steelcase. ☐ Review your Continuing CDA for products or product categories that are not included; negotiate to include additional product in your CDA. ☐ If a contract or CDA is expiring in the foreseeable future, propose a renewal earlier than usual so that we can lead the conversation. ☐ Introduce/propose our Exchange eCommerce platform. ☐ Introduce/propose Steelcase Financial Services. ☐ Introduce/propose Applied Research + Consulting. ☐ Seek opportunities to use the Workplace Tools + Resources.

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