**Axtria**

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# Introduction

## What is Account and Account Planning?

An account refers to a specific customer or client that your team is working with. It includes all the important information, activities, and plans related to that customer—such as contacts, meetings, goals, documents, and strategy. Managing an account helps your team build a strong relationship with the customer and deliver value through organized planning and collaboration.

An account plan is a detailed guide that outlines the goals, strategies, and actions for working with a specific customer or client. It helps the team stay organized, focus on what’s important, and work together to build a successful relationship and achieve shared goals.

## Overview of SAP Module

The Strategic Account Planning (SAP) helps team build strong, lasting relationships with your key customers. It lets you create personalized plans for each customer, so everyone knows the goals and the steps needed to reach them. You can easily track progress, make updates, and work together to make sure your efforts lead to success for both your company and your customers. This way, your team stays organized, focused, and ready to respond to what the customer needs over time.

# Background & Business Context

## Current state of account management

## Pain points / gaps in current process

## Business drivers (e.g., growth, retention, share-of-wallet)

# Functional Specifications of Account Management

## Account Types and Structures

SalesIQ platform supports a flexible account hierarchy that can be easily created, modified, or removed as needed. The structure allows at least three levels of accounts, each with its own account plan and visibility into related accounts. This tab displays a structured view of all accounts in a hierarchical format, helping users understand how different accounts are related (e.g., HQ → Regional → Local).

### Corporate HQ

* + - * This is the top-level account in the hierarchy.
      * It represents the main or parent organization.
      * Needs to have its own account plan.
      * Should be able to view all related account plans, including those of regional and local accounts under it.

### Regional Hub

* + - * This is the mid-level account, which falls directly under the corporate HQ.
      * Represents a specific geographic or operational region.
      * Needs to have its own account plan.
      * Should be able to view related plans, such as those of local clinics under it.

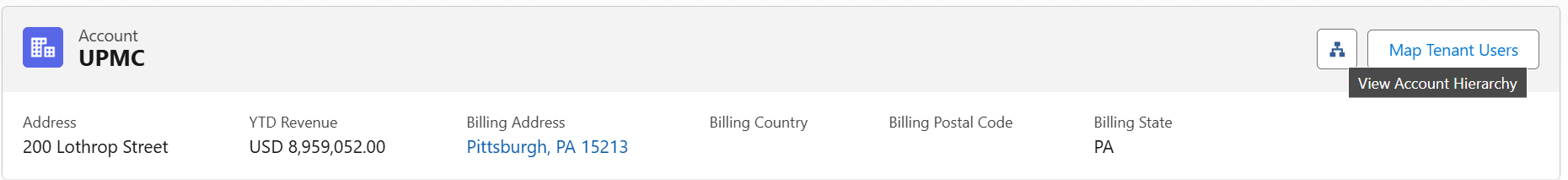
### Local Clinic

* + - * This is the lowest level in the account hierarchy.
      * Represents individual locations or branches, such as clinics or offices.
      * Needs to have its own account plan.
      * Should also be able to view related account plans, including those at the regional or HQ level.

The "Current" label is used to highlight the account that is actively being viewed or worked on within the hierarchy. This helps users quickly identify their point of focus, especially when navigating between multiple related accounts.

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## Features and Functionality of Account Management

### Account Profile

#### Collaboration on Patient Engagement: Ability to enhance patient interaction

This component tracks and displays the level of collaboration between teams or stakeholders in driving patient engagement initiatives. It may include data on outreach efforts, programs implemented, and collaboration with healthcare providers or patients. The target value defines a specific goal for collaboration, the number of outreach programs completed within a given timeframe.

#### Sales YTD: Ability to track YTD sales

This shows the year-to-date (YTD) sales performance, including actual sales figures versus target values. It provides real-time insight into the product's market performance.

#### Product Rank in Preferred Prescribing: Ability to rank products by preference

This metric ranks the product in terms of its preference by healthcare providers or key stakeholders for prescribing. It reflects the product's standing within the market.

#### Customer Satisfaction Score: Ability to measure customer satisfaction

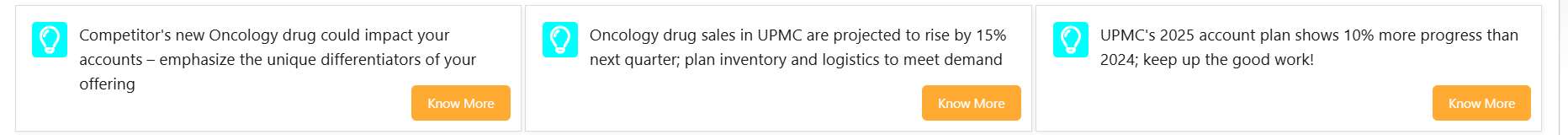
This component displays the average customer satisfaction score, reflecting how satisfied customers are with the product or service. It's often based on surveys or feedback tools. It’s calculated on a 5-point scale.

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#### Insights: Ability to capture key account insights

The three boxes contain predefined insights that are critical to understanding account performance. These insights could include key metrics, trends, or alerts related to product usage, customer feedback, or sales performance.



#### Account Management: Ability to manage account activities

Accounts can be created via interface or can be imported through API as per the configurable frequency.

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User with Administrator role can have full access to the accounts view where other user can access the account details as per their assignments.

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#### Account Plan: Ability to manage strategic customer plans

Account Plan can be created for each account. Each account is associated to a single plan. Account Plan can be created from the account record, by clicking the “New” in the Account Plan section below.

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### Stakeholders: Ability to manage key account contacts

Stakeholders are individuals or groups who are directly or indirectly involved in the project or affected by its outcomes. They have a vested interest in the success of the platform and may influence requirements, priorities, and decisions. Here, key stakeholders include users (HCPs), and decision-makers (e.g., executives). Understanding their roles and expectations is critical to meet business goals and enhances user adoption.

Stakeholders can be created/managed at the account level. Each user can have a target list of Stakeholders and is a subset of Stakeholders list. User can mark as a key stakeholder; one can have multiple key stakeholders at User level. User can create/ view stakeholders list at account level.

Stakeholders can be imported from other systems into SalesIQ. The visibility of each stakeholder can be controlled based on users field function. This visibility by field function is included as a part of data import of Stakeholders and Target list.

Each stakeholder profile includes personal and professional details, communication preferences, and their key priorities (“careabouts”).

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#### Stakeholder’s Details: Ability to manage stakeholder details

This section provides specific information about each key stakeholder involved. It includes their personal and professional details. Understanding stakeholder details helps ensure clear communication, defines accountability, and aligns expectations.

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#### Communications: Ability to track stakeholder interactions

This section outlines how and when each stakeholder group will be engaged throughout the project. It includes preferred communication channels (e.g., email, meetings, reports) and frequency (e.g., weekly, monthly). Clear communication ensures all stakeholders are informed, aligned, and able to provide timely input or approvals.

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#### Careabouts: Ability to record stakeholder priorities

This section highlights the key priorities, concerns, and expectations of each stakeholder. It helps the project team understand what matters most.

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### Interactions: Ability to manage account communications

The **Interactions Tab** records every communication or engagement with stakeholders, capturing essential details such as the interaction title, description, type, and involved parties.

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### Team: Ability to manage account team

Organizes and tracks the different teams involved, providing clear identification and departmental associations.

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### Members: Ability to manage account team users

Members can be aligned to each account. User can view a list of "Team Members" for the account based upon the role assignments. The **Members Tab** captures key details about each project team member, including their name, role, team, start and end dates, and status.

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### Alerts: Ability to notify users of account updates

Market Events, Alerts and NBAs can be imported from different system based on the configurable frequency. The visibility/access of data can be controlled on the based-on user’s field function. A list of Market events, Alerts and NBAs is displayed for associated accounts and accounts below it. Any Market Events, Alerts and NBAs must be visible to other accounts related to it in account hierarchy.

#### Market Alerts: Ability to receive market change alerts

The Market Alerts Tab provides a structured view of critical market developments, including alert name, type, and detailed description.

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#### Next Best Actions: Ability to highlight recommended next steps

The **Next Best Actions Tab** offers actionable recommendations for stakeholder engagement. Each entry includes a clearly defined topic, action type, and a suggestion phrased as a direct next step.

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#### Internal Alerts: Ability to notify team of internal updates

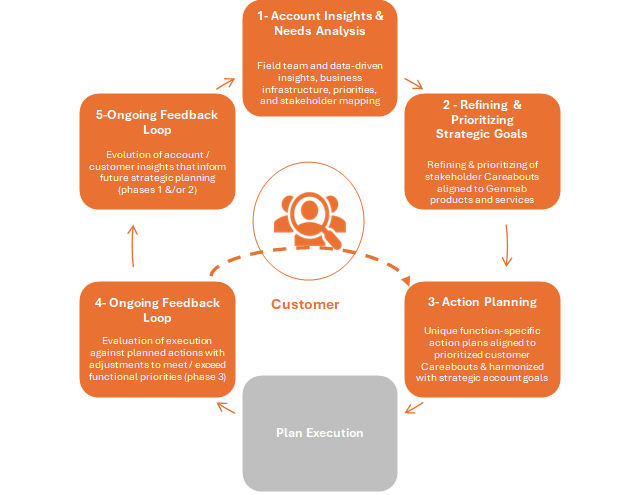
The **Internal Alerts Tab** tracks internally visible alerts tied to stakeholders or products. Each alert includes a title, type, associated product, responsible user, and a follow-up mechanism.

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# Process Flow

## Account plan workflow



### Account Insights & Needs Analysis

This is the discovery phase, where the team gathers information about the customer using data analysis and field experience. The goal is to understand how the customer is structured, what they need, what they care about, and who makes key decisions.

### Refining & Prioritizing Strategic Goals

Using the insights collected, the team defines and ranks the most important goals for the customer. This ensures that customer needs are clearly matched with what the company can offer through its products and services.

### Action Planning

Based on the chosen goals, the team builds a clear action plan. This outlines who is responsible for each task, when things need to be done, and how different departments will contribute to meeting the customer’s expectations.

### Ongoing Feedback Loop (Execution Review)

As the action plan is being carried out, the team monitors progress to see what’s working and what isn’t. Adjustments are made as needed to keep everything on track and ensure results.

### Ongoing Feedback Loop (Strategic Update)

New insights from working with the customer and reviewing outcomes are collected to improve future planning. This keeps the account strategy up-to-date and aligned with the customer's evolving needs.

### Plan Execution (Gray Box)

This is the phase between planning and review, where the team puts the action plan into motion and delivers the actual work.

### Centerpiece: Customer

The customer remains the focus at every stage. Every goal, plan, and action are designed to deliver value to them and strengthen the relationship.

## Touchpoints across teams

## Planning cadences (quarterly, annual)

# Functional Specifications of Account Planning

### Creation of New Account Plan

An **Account Plan** can be created for each individual account, with each account being associated with a single, unique plan. Account Plans are initiated directly from the account record by selecting the **“New”** button located within the **Account Plan** section.

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### Account Plan Record: Ability to quickly access linked account

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### Account Plan Dashboard: Ability to view centralized account plan details

Below the account plan record, there are multiple tabs which are details, Stakeholder map, Goals, Initiatives, Document, including the **Account Plan Dashboard**. This dashboard provides various types of information such as overall plan progress, goal progress, team information, account details, goals, actions, and initiatives—offering a comprehensive view of the account’s strategic status.

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#### Methodology for Calculating Overall Plan, Goal Progress, and Initiatives

1. Initiative Progress (%) = (Number of Completed Actions / Total Actions in Initiative) × 100

Example:

* Total Actions: 5
* Completed Actions: 3
* Initiative Progress = (3 / 5) × 100 = **60%**

1. Goal (%) = Average Progress of All Initiatives under the Goal

Example:

* Initiative 1 Progress: 60%
* Initiative 2 Progress: 80%
* Goal 1 Progress = (60% + 80%) / 2 = **70%**

1. Overall Plan Progress (%)/ Goal Progress = Average Progress of All Goals in the Plan

Example:

* Goal 1 Progress: 70%
* Goal 2 Progress: 90%
* Overall Plan Progress / Goal Progress= (70% + 90%) / 2 = **80%**

#### Action Details: Ability to manage account plan tasks

**Action Details** provide a summary of specific tasks within an initiative, including key information such as owner, due date, status, and related stakeholders. This helps track progress, responsibilities, and timelines at a granular level.

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**The Interactions section in the Account Plan Module** displays both upcoming and past interactions. Upcoming interactions show future-dated activities, while past interactions include completed, in-progress engagements.

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### Details Tab: Ability to view core account and plan info

**Details tab** provides deeper insights through four key sections: **Information**, **SWOT Analysis**, **Customer Landscape**, and **Competitive Landscape**. These sections collectively offer a comprehensive view of the account’s background, strategic strengths and weaknesses, customer context, and competitive positioning.

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#### Information: Ability to display key account and plan details

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#### SWOT Analysis: Ability to capture SWOT insights

The SWOT Analysis section records the account’s main **Strengths**, **Weaknesses**, **Opportunities**, and **Threats**. This helps your team understand important factors that can impact success. By analyzing these areas, the team can align goals, initiatives, and actions to make smarter decisions and increase the chances of achieving the plan’s objectives.

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#### Customer Landscape: Ability to outline customer structure and priorities

The **Customer Landscape** section outlines the Account’s **strategic priorities, key performance indicators (KPIs), challenges,** and **industry trends**. It provides a contextual understanding of the Account’s business environment to align account strategies effectively.

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#### Competitive Landscape: Ability to highlight competitor presence

The **Competitive Landscape** section highlights the **competitors**, along with their **strengths and weaknesses**. It helps identify competitive risks and positioning opportunities within the account industry.

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### Stakeholder Map Tab: Ability to visualize stakeholder roles and influence

The **Stakeholder** tab displays the **account hierarchy**, listing key individuals along with their **names and designations** to show their roles within the organization. For example, if the account is a **Corporate HQ**, the tab may reflect reporting structures across regional or business units, helping teams identify decision-makers and influencers for more effective engagement.

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### Goals: Ability to manage account strategic objectives

First describe whats a Goal itself

The **Goals** tab provides a dedicated view of all strategic objectives defined for the account plan. It outlines each goal’s status, related initiatives, progress, and key metrics—helping teams track alignment with overall account strategy and measure success over time. The above interface is displayed when the user navigates to the **Goals** tab.

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When the user clicks on a specific goal, the interface expands to display detailed **key metrics**, as outlined in the table below. This page also showcases all **initiatives linked to the selected goal**, along with their individual progress and related information, offering a comprehensive view of the goal's execution and alignment.

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The **Related** sub-tab displays a list of all **initiatives associated with the selected goal**, providing quick access to their details, progress, and status. This helps users track how each initiative contributes to the achievement of the overall goal.

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**Table – Details Sub-Tab**

### Initiatives Tab: Ability to organize and track key efforts

The Initiatives tab provides a detailed view of the key strategic efforts created to support account goals. Each initiative outlines its purpose, progress, and ownership. When a user clicks into a specific initiative, they can view a list of all related actions—the individual tasks that drive the initiative forward. This tab helps users track how initiatives are progressing and ensures that every action is aligned with the larger strategic direction.

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When the user clicks on a specific **initiative**, the screen displays key details and metrics related to that initiative—such as its Title, progress and description. The user can also see a list of all **related actions**, which are the specific tasks being carried out to achieve the initiative’s objectives. This view helps users understand what’s being done, who’s responsible, and how each action supports the initiative's success.

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### Documents Ability to upload and access account files

The **Documents** tab serves as a central place for account team members to upload and access files related to the account plan. This can include materials from interactions, meeting notes, presentations, or any other supporting documents. It helps maintain organized, easily accessible records that support collaboration and informed decision-making.

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# Non-Functional Requirements

* Performance expectations
* Security and access controls
* Audit trail
* Mobile access

# Data Requirements

* Source systems (CRM, ERP, Excel, BI)
* Data model (Accounts, Contacts, Plans, KPIs)
* Integration points

# Assumptions & Constraints

* All strategic accounts are defined before rollout
* Users have CRM access
* Phased rollout may be applied

# Dependencies

* Sales enablement content availability
* Territory finalization

# Success Metrics / KPIs

* % of strategic accounts with active plans
* Plan completion by quarter
* YoY revenue growth in planned accounts
* Win rate improvement post planning

# Appendices

* Sample templates (account plan, SWOT, goal sheet)
* Glossary