



THE  
**HOLISTYX**  
GROUP

# S.C.O.P.E. - Strategic Customer Objectives Planning Exercise

*Account Planning motions that help build customer  
relationships that thrive, not just survive*

# The State of Strategic Customer Relationship Planning

Over

22%

of professional service firms do not have an effective account plan

: Sirius Decisions

67%

of strategic account plans fail

: inc.com

\$1 – 5M

size of consulting engagements for large professional service firms

: McKinsey

Typical Account Team size:

5

: Hackett Group

13%

higher revenue growth for teams that have effective account plans

: Bain & Company

# Why Do Strategic Account Plans Fail

- 1 Unclear customer outcomes – lack of roadmap**  
Lacking clearly stated customer account objectives and detailed roadmap, customer account strategies lose direction, sponsorship, and momentum.

- 2 Incomplete intel leading to a lack of urgency from the stakeholders**

Customer strategic plans require sufficient data and insights to enable account teams to present a cogent case of the cost of inaction.

- 3 Unclear business value – not value-led and tracked**

The account team must be focused on delivering and measuring business value through customer Projects. If not, efforts to scale or extend successes become cost centric conversations.

- 4 Poor Communication & Collaboration – not aligning to the customer**

Not listening to the customer or collaborating with the wrong people may lead to an improper perspective of the customer opportunities.

- 5 Inadequate resources - Slower follow-through**

Account teams often leverage resources from other common specialized areas from the company. If the right resources are not aligned with the customer workstreams, the resulting delays in follow through will severely impact customer satisfaction.





# The Holistyx Difference

## S.C.O.P.E. Customer Account Planning Method

1

### Clear outcomes – Develop actionable multi-horizon roadmap

Starting from the broad industry perspectives to specific customer outcomes, our methods help account teams to build realistic and actionable customer strategies through human centered design thinking.

2

### Fuller stakeholder buy-in – Create sense of urgency

Our methods provide for full stakeholder management by developing relationship heat and affinity maps to get maximal customer stakeholder consensus.

3

### Crisp business value – Value focused strategy and execution

Our method insists on developing a quantified business value analysis using key benefit, cost, and risk levers that are used to create a prioritized customer opportunity backlog.

4

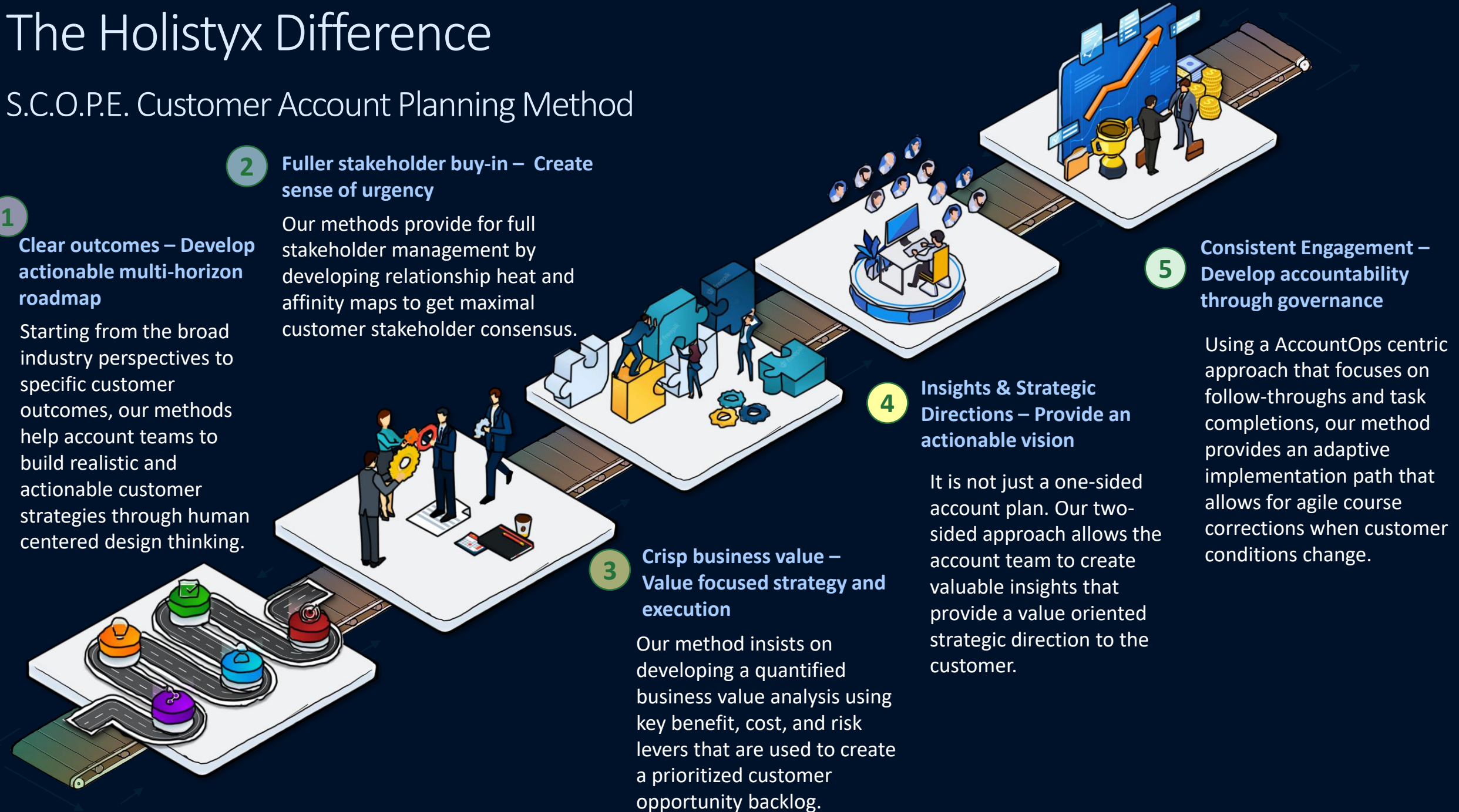
### Insights & Strategic Directions – Provide an actionable vision

It is not just a one-sided account plan. Our two-sided approach allows the account team to create valuable insights that provide a value oriented strategic direction to the customer.


5

### Consistent Engagement – Develop accountability through governance

Using a AccountOps centric approach that focuses on follow-throughs and task completions, our method provides an adaptive implementation path that allows for agile course corrections when customer conditions change.




# Unlocking Benefits with S.C.O.P.E.



Reduced Time to Decision Making

Streamline processes and accelerate decision cycles.




Focused Identification of Strategic Areas

Pinpoint growth opportunities and focus resources effectively.




Business Value Driven

Align planning with organizational goals and outcomes.




Increased Customer Satisfaction and Loyalty

Deliver tailored solutions and build lasting relationships.




Improved Customer Lifetime Value

Maximize long-term revenue potential.



Stickiness

Retain customers and enhance loyalty.



Faster Quota Retirement

Achieve sales targets efficiently.




Larger Sales Impact

Drive revenue growth.



Annuity Revenue

Cultivate recurring business.




Stronger Account Relationships

Foster trust and collaboration.



Effective Resource Allocation

Optimize investments.



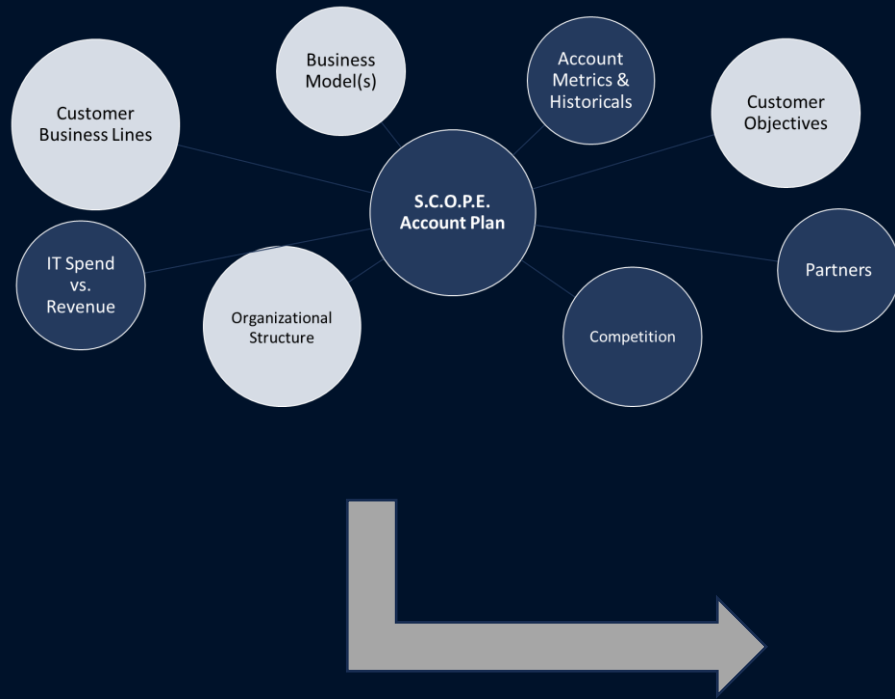
Reduced Customer Churn

Sustain long-term partnerships.

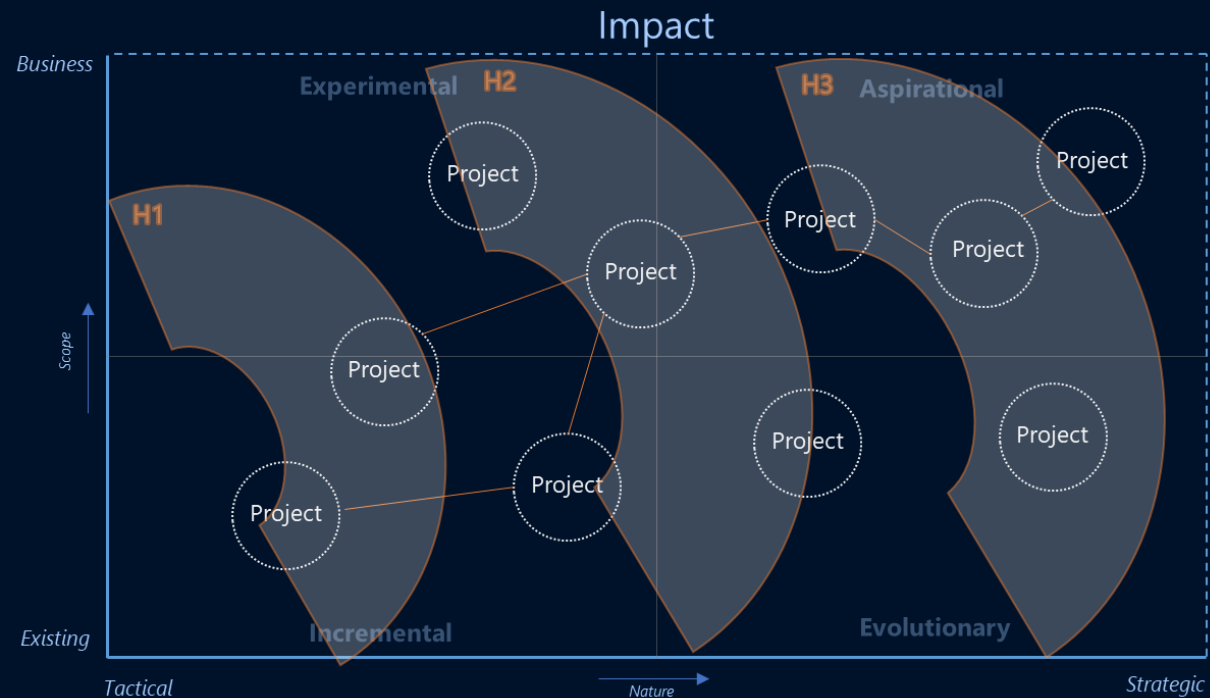


Leading to these successful outcomes

## A Holistic Perspective



## Horizons of Customer Strategic Plan

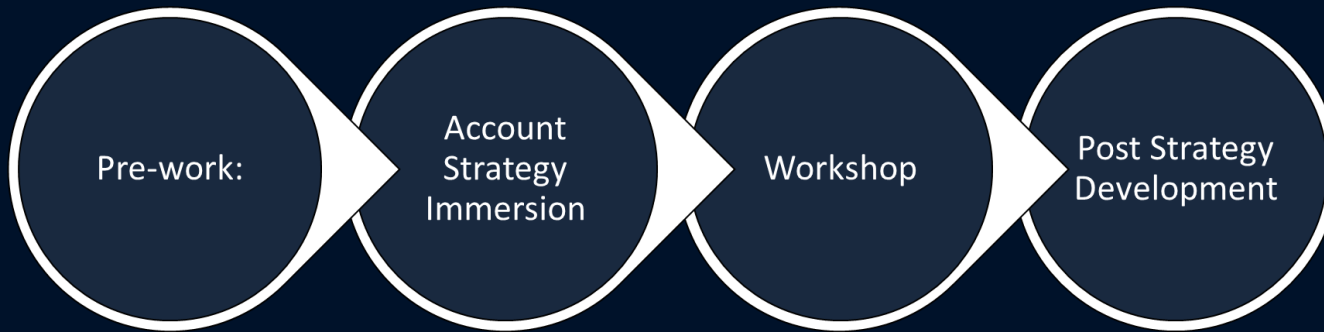


North Star Vision describing the aspirational vision for your customer

*A well-rounded account plan that surfaces opportunities, offsets challenges and unlocks potentials in three horizons....*

- **H1:** Foundational Key Projects which are key to the customer's current successes
- **H2:** Innovative Projects which get the customer to the next level
- **H3:** Aspirational Projects that are significantly disruptive and likely to change the customer operating model.

# S.C.O.P.E. Process & Work Products



- Capture the “Who’s Who?” for both the internal and customer team.
- Decide on key invitees.
- Gather detail on account activities and perspectives on customer.

- Schedule Planning Workshop
- Develop Account Planning Hypotheses.
- Socialize and gain agreement with key stakeholders.

- Develop Customer Value Levers.
- Identify Partner Opportunities aligned to Customer Value Levers
- Map to 3-Horizon Plan for account

- Develop Opportunity Backlog
- Establish Account Program Governance



Account Plan



Templates



Use Cases and Scenarios\*



Business Value Model



Stakeholder Alignment



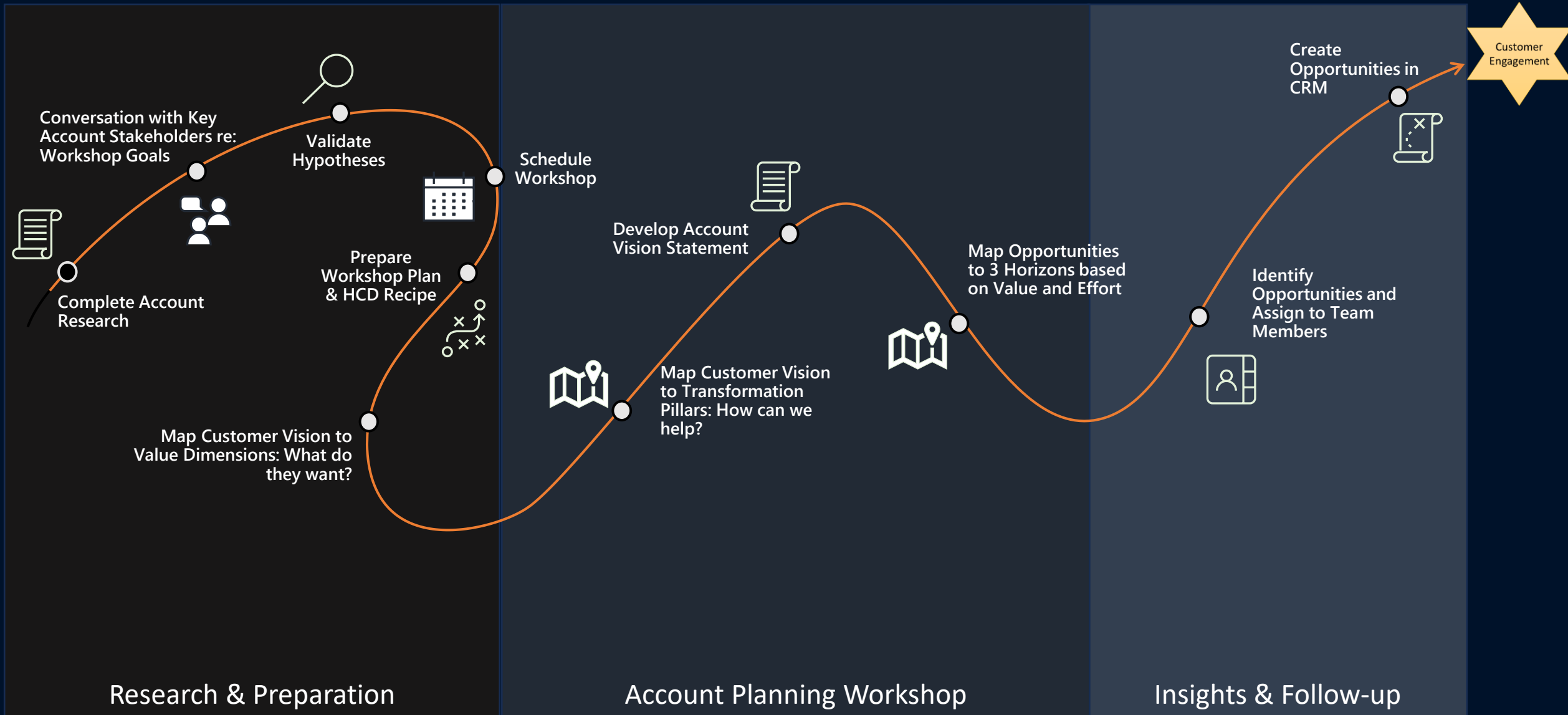
Three Horizon Roadmap



Strategic Account Direction

*\*Depends on the nature and*

# S.C.O.P.E. Journey Map





# Your Journey With Your Customer Begins Here

## Strategize

Developing the plan

## Imagine

Discovering the opportunities

## Realize

Manifesting the strategic plan



T H E  
**HOLISTYX**  
G R O U P

*"Simplifying the complexity of change"*

THANK YOU!

# Our Supplemental Offerings

*These supplemental offerings are designed to help your own consulting team to focus on developing key customer relationships and higher order engagement without needing to be mired in long planning cycles for workshop sessions. The quicker turnaround on workshop readouts, insights, etc. is key to reducing time to customer value.*

Title	Description	Duration
Design Thinking Workshops	Design thinking workshop facilitation that will help your own consultants to focus on the co-creation of customer value.	1-3 weeks
Event Storming Workshops	Focused process modeling to free up your own consultants for higher value engagements	1-3 weeks
Visual Storytelling	Illustrations, storyboards, and agile visual clickable prototypes align stakeholders to support conceptional vision while demonstrating the 'art of the possible'	1-3 weeks
Design Services	Wire framing, interactive designs, sitemaps, personas, etc.	2-3 weeks
Value Engineering Workshop	Co-develop multiple levels of business value cases – back-of-the-napkin to highly detailed versions through design thinking collaborative sessions	1-3 weeks
Value Management	Provide a value management plan to develop, track and course correct the value equation.	3-6 weeks
Bespoke Consulting	Technology and management consulting that is uniquely specific to the customer.	Varies