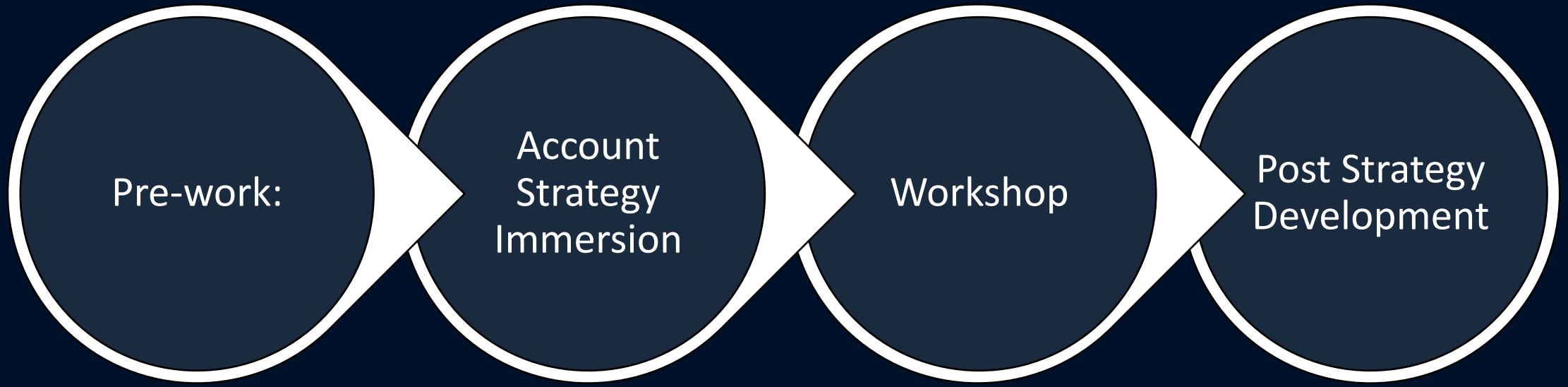
THE HOLISTYX GROUP

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

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

S.C.O.P.E. Workflow



- 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

S.C.O.P.E.

Session Work Products

Account Plan

Templates

Use Cases and Scenarios*

Business Value Model

Stakeholder Alignment

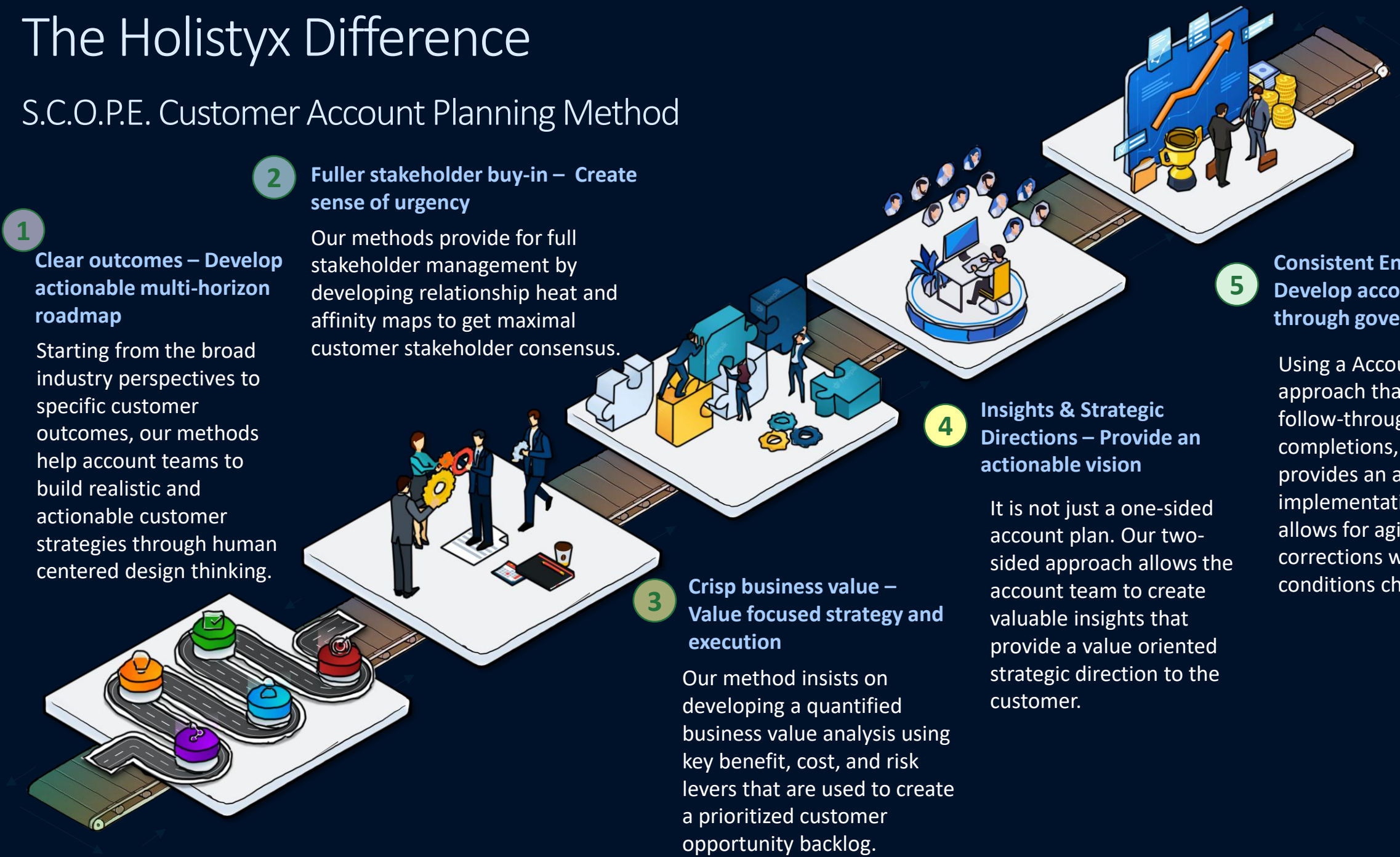
Three Horizon Roadmap

Strategic Account Direction

**Depends on the nature and maturity of the account*

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.

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"Simplifying the complexity of change"
THANK YOU!
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