

Galaxy Account Plan

9-March-05

By Jerry Anderson

Contents

- **Section 1: Customer Profile**
- **Section 2: Opportunity Forecasts**
- **Section 3: Sales Campaign**
- **Section 4: Customer Service**
- **Section 5: Action Plan**

Section 1: Customer Profile

Know Your Customer

Galaxy: Account Overview

This section of an account plan is usually devoted to a high level summary of the customer's business and your historical relationship with them.

Galaxy: Financial Trends

Business Unit Name	2004 Revenue (M)	2003 Revenue (M)	2004 Profits (M)	2003 Profits (M)	# Employees
Business Unit A	3,333.8	2,856.4	333.3	286.1	8,275
Business Unit B	777.4	666.1	78.4	66.9	1,943
Business Unit C	555.2	77.5	56.1	78.7	1,497
Business Unit D	999.7	333.1	99.2	33.8	2,497
Business Unit E	6,555.6	5,788.4	655.7	578.2	16,387
Total By Business Unit	12,221.7	9,721.5	1,222.7	1,043.7	30,599
% Change By Year	25.7%		17.2%		

Galaxy: Sales By Region

Business Unit Name	U.S.	U.K.	Other EMEA	S. Amer.	Asiapac	Other
Other	7,332.0	1,222.6	1,222.0	608.6	1,222.7	608.9
Total Sales By Region	7,332.0	1,222.6	1,222.0	608.6	1,222.7	608.9
% Of Total	60.0%	10.0%	10.0%	5.0%	10.0%	5.0%

Galaxy: Products/Services and Competitors

Core Products & Services	Principal Competitor(s)
Product Or Product Group A	Competitor Name(s)
Product Or Product Group B	Competitor Name(s)
Product Or Product Group C	Competitor Name(s)
Product Or Product Group D	Competitor Name(s)

Galaxy: Key Customers and Alliance Partners

Key Customers and Alliance Partners	Key Customer	Alliance Partner
Company A	X	
Company B	X	
Company C		X
Company D	X	
Company E		X

Galaxy: Key Decision Makers and Influencers

Name	Title	S	F	O	N A	Advocacy Position	Business Relationship
Carlisle, John	CIO					Not Sure	Customer
Keene, Peter	CFO	X		X		Supportive	Customer
Kimber, Dan	Consultant		X			Technical: Supportive	Consultant/Other
Nance, Charlie	Operations Supervisor		X			Neutral	Customer
Smith, Pat	Director	X				Sponsor/Coach	Customer
Thomas, Ben	Manager Computer Operations		X			Inside Salesperson	Customer

Galaxy: Buying Practices and Policies

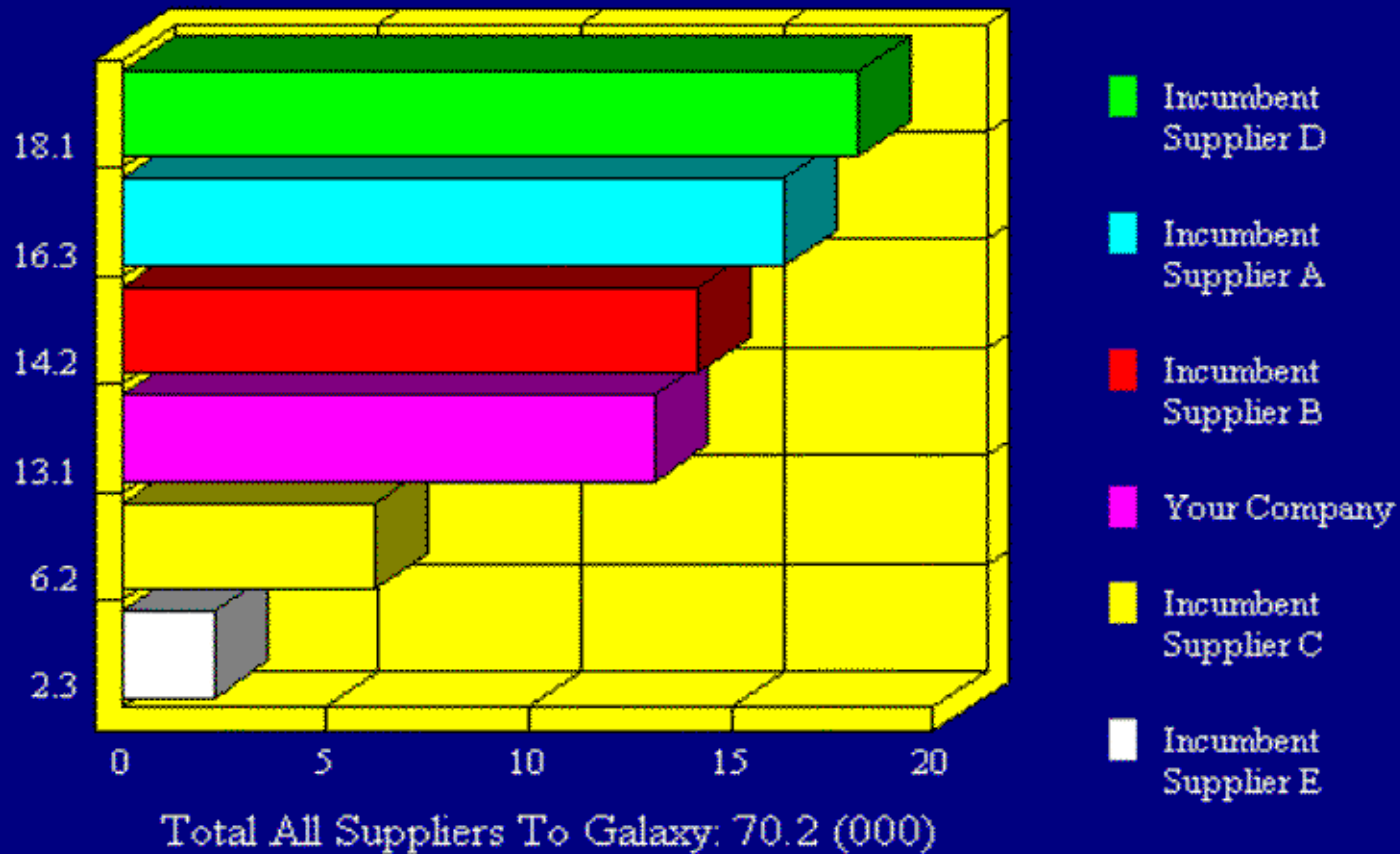
Ques. No.	Question	Status/ Answer
1	Is there a central buying organization?	Yes
2	Do business units coordinate their buying decisions in order to achieve volume purchasing power?	No
3	Are buying decisions influenced by standards or best practices committees?	Yes
4	Do buying practices vary by geographic regions?	Yes
5	Do end user organizations exert significant influence over applicable buying decisions?	No
6	Do consultants exert considerable influence over applicable buying decisions?	Yes
7	Are there key systems integration or outsourcing contractors who exert significant influence over buying decisions?	No
8	Can systems integrators or outsourcers purchase our products and services as part of their contractual relationship(s) with this client?	Not Applicable
9	As a matter of policy, does this client normally buy only after formal competition (RFP)?	Yes

Galaxy: Buying Practices and Policies

Ques. No.	Question	Status/ Answer
10	As a matter of practice, have recent buying decisions been decided predominantly on the basis of price?	No
11	Does this client embrace a strategy of multiple suppliers to ensure diversity, competition, and/or service quality?	Yes
12	Does this client have significant relationships with our firm (other than as a buyer of our products and services) that could impact buying decisions? In other words, are their balance of trade implications?	No
13	Does this client have significant relationships with any of our competitors (other than as a buyer of their products and services) that could impact buying decisions? In other words, are their balance of trade implications?	Yes

Galaxy: Supplier Share

SUPPLIER REVENUE (000)



Galaxy: Supplier Contract Status

Supplier Name	Contract Status/Notes
Your Company	Current contract expires November 200x. The customer has indicated that they intend to issue an RFP at that time.
Incumbent Supplier A	<p>There are currently three contracts:</p> <ol style="list-style-type: none"> 1) Mainframe Maintenance expires June 200x. It is valued at \$12M/Year. 2) Systems integration project expires March 200x. Current value is \$35M over three years. 3) The outsourcing contract is valued at only \$5M per year but will grow as more functions are added. Contract expires in July 200x.
Incumbent Supplier B	Not Sure
Incumbent Supplier C	Not Sure
Incumbent Supplier D	<p>This is a pilot program which requires EDS to assume responsibility for all data center operations. If it is successful, EDS will be considered for additional outsourced functions.</p> <p>Current contract expires in September of 200x.</p>

Galaxy: Supplier Contract Status

Supplier Name	Contract Status/Notes
Incumbent Supplier E	<p>Global Telecom has been successful in convincing this client to outsource their trans-border telecom operations.</p> <p>They currently have a one year contract which will expire in December 200x. Galaxy has indicated their intention to renegotiate a five year agreement with Global Telecom at that time.</p>

Click On The Description Or The Link To Display (Must Be In Slide Show Mode)

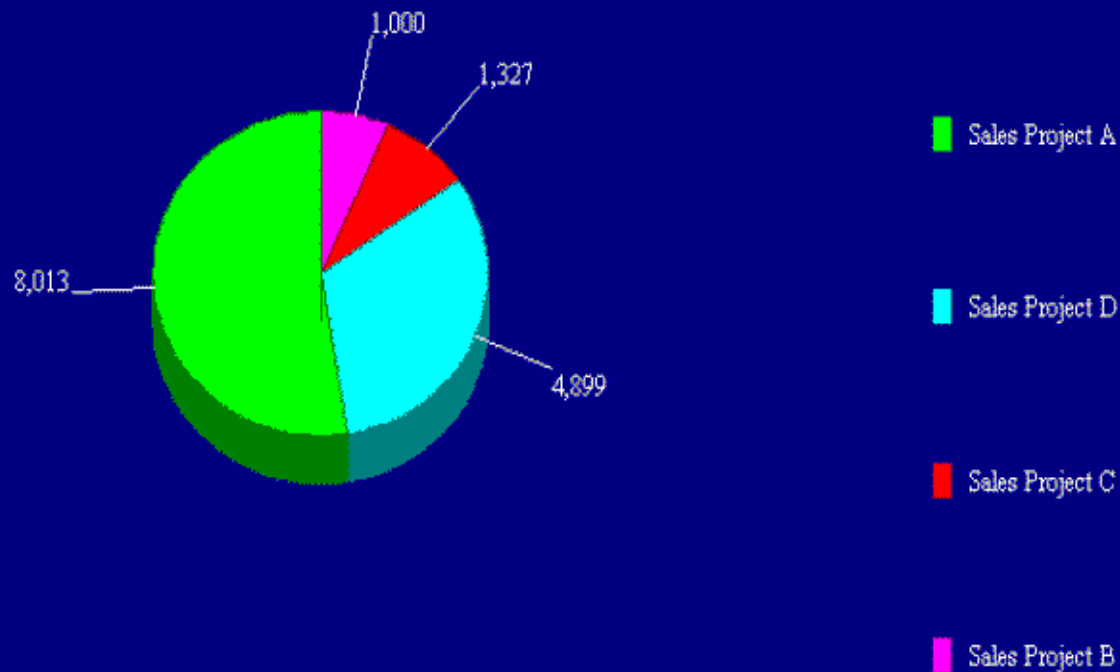
Description	Web Link Or Other Document Location
Anderson & Kinsella Home Page	http://www.AndersonKinsella.com/
Business Week Online	http://www.businessweek.com/
CNN Business News	http://money.cnn.com/
Financial Times On-Line	http://news.ft.com/home/us
Note to users: You may also point to links in folders on your hard drive or within your network.	C:\Program Files\Anderson & Kinsella\WIN IT\Organization_Chart.ppt
Wall Street Journal On-Line	http://online.wsj.com/public/us

Section 2: Opportunity Forecasts

**Quantify and Qualify What You
Will Sell**

Galaxy: Opportunity Summary

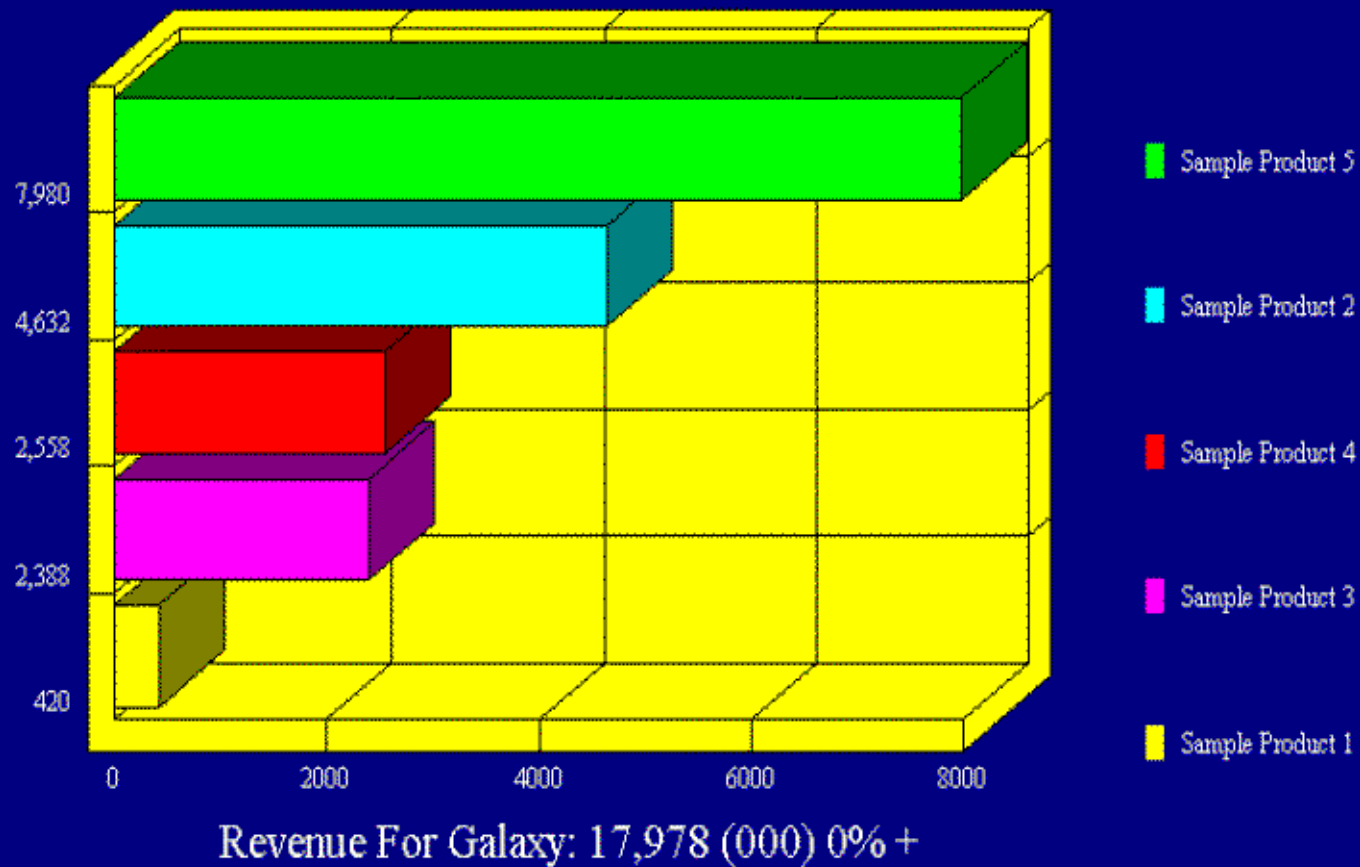
REVENUE (000) THIS FY BY PROJECT



Galaxy: 15,239 With Probability Of
0% And Greater

Galaxy: Opportunity Summary

PRODUCT COMPARATIVE REVENUE (000) NEXT FY



Section 3: Sales Campaign

**Develop & Execute Winning
Strategies**

Galaxy: Competitive Differentiation

Business Drivers/Customer Needs	Your Company	Competitor #1	Competitor #2	Competitor #3
Customer's Expressed Need or Business Imperative A	Excellent	Fair	Excellent	Poor
Customer's Expressed Need or Business Imperative B	Poor	Excellent	Good	Good
Customer's Expressed Need or Business Imperative C	Good	Fair	Fair	Fair
Customer's Expressed Need or Business Imperative D	Excellent	Good	Poor	Poor
Customer's Expressed Need or Business Imperative E	Poor	Good	Good	Not Determined

Galaxy: Competitive Positioning

Decision Makers & Influencers	Your Company
Carlisle, John: CIO	Fair
Keene, Peter: CFO	Excellent
Kimber, Dan: Consultant	Excellent
Nance, Charlie: Operations Supervisor	None/Poor
Smith, Pat: Director	Fair
Thomas, Ben: Manager Computer Operations	None/Poor

Galaxy: Sales Objective
Description of Objectives or Goals for the Account. This is
The Account Vision Statement.

Strategy 1: Describes "WHAT" will be needed to achieve objective. (Note that actions will subsequently define "HOW" you will execute this strategy (tactics).

Strategy 2: Second strategy for achieving objective.

Strategy 3: Third strategy for achieving objective.

Strategy 4: Fourth strategy for achieving objective.

Etc.

Strategies To Achieve Objective

Galaxy: Value Proposition

Customer's Expressed Need or Business Imperative

A

- Describes how your company will satisfy this need, i.e. defines your value in terms that relate to the client.
- Persuades the customer to move toward your objective(s).
- Provides a common message for all members of your virtual sales team
- Defines proposal themes to be stressed.

Your Company	Competitor #1	Competitor #2	Competitor #3
Excellent	Fair	Excellent	Poor

Galaxy: Value Proposition

Customer's Expressed Need or Business Imperative

B

- Describes how your company will satisfy this need, i.e. defines your value in terms that relate to the client.
- Persuades the customer to move toward your objective(s).
- Provides a common message for all members of your virtual sales team
- Defines proposal themes to be stressed.

Your Company	Competitor #1	Competitor #2	Competitor #3
Poor	Excellent	Good	Good

Galaxy: Value Proposition

Customer's Expressed Need or Business Imperative

C

- Describes how your company will satisfy this need, i.e. defines your value in terms that relate to the client.
- Persuades the customer to move toward your objective(s).
- Provides a common message for all members of your virtual sales team
- Defines proposal themes to be stressed.

Your Company	Competitor #1	Competitor #2	Competitor #3
Good	Fair	Fair	Fair

Galaxy: Value Proposition

Customer's Expressed Need or Business Imperative

D

- Describes how your company will satisfy this need, i.e. defines your value in terms that relate to the client.
- Persuades the customer to move toward your objective(s).
- Provides a common message for all members of your virtual sales team
- Defines proposal themes to be stressed.

Your Company	Competitor #1	Competitor #2	Competitor #3
Excellent	Good	Poor	Poor

Galaxy: Value Proposition

Customer's Expressed Need or Business Imperative

E

- Describes how your company will satisfy this need, i.e. defines your value in terms that relate to the client.
- Persuades the customer to move toward your objective(s).
- Provides a common message for all members of your virtual sales team
- Defines proposal themes to be stressed.

Your Company	Competitor #1	Competitor #2	Competitor #3
Poor	Good	Good	Not Determined

Galaxy: Positioning Plan

Current Relationship	Key Decision Maker/Influencer	S	F	O	N A	Principal Relationship Owner
Fair	Carlisle, John: CIO					Miller, Arthur
Excellent	Keene, Peter: CFO	X		X		Mays, Gerry
Excellent	Kimber, Dan: Consultant		X			Pat Murphy 404/555-1212
None/Poor	Nance, Charlie: Operations Supervisor		X			Kevin O'Reilly 312/555-1212
Fair	Smith, Pat: Director	X				Pat Murphy 404/555-1212
None/Poor	Thomas, Ben: Manager Computer Operations		X			None Planned

Section 4: Customer Service

Ensure Customer Satisfaction

Galaxy: Service/Support Issues

Issue
(Galaxy) First Issue That May Be Aggravating The Customer, Impeding Sales Or Impacting Margins.
(Galaxy) Second Issue That May Be Aggravating The Customer, Impeding Sales Or Impacting Margins.
(Galaxy) Third Issue That May Be Aggravating The Customer, Impeding Sales Or Impacting Margins.

Galaxy: Account Coverage & Support

Location/Project	Support Resources
Albuquerque, NM	<ul style="list-style-type: none">➤ Sales: Joan Harvey 505/555-1212➤ Tech. Support: Jill Weidemeier 505/555-1212➤ Project Mgr.: Tom Gearhart 203/555-1212➤ Order Pocessing: Ken Shipley 203/555-1212➤ Billing: Ken Shipley 203/555-1212➤ Install/Maintain: Donna Evans➤ Contracting: None Required➤ 1st Tier Escalation: Larry Griffone 203/555-1212➤ 2nd Tier Escalation: Bill Jones 201/555-1212

Galaxy: Account Coverage & Support

Location/Project	Support Resources
Brussels Belgium	<ul style="list-style-type: none">➤ Sales: George Washington 410/555-1212➤ Tech. Support: Henrietta Johnson➤ Project Mgr.: Tom Gearhart➤ Order Pocessing: Larry Smith➤ Billing: Open➤ Install/Maintain: None➤ Contracting: Bob Goldstein➤ 1st Tier Escalation: Harriet Jones➤ 2nd Tier Escalation: Bill Jones

Galaxy: Account Coverage & Support

Location/Project	Support Resources
Cary, NC	<ul style="list-style-type: none">➤ Sales: Bill Jones 201/555-1212➤ Tech. Support: Gary Jones➤ Project Mgr.: Tom Gearhart➤ Order Pocessing: Larry Smith➤ Billing: Henry Ames➤ Install/Maintain: Jim McGaughy➤ Contracting: None Required➤ 1st Tier Escalation: Harriet Jines 5050/555-1212➤ 2nd Tier Escalation: Bill Jones 201/555-1212

Galaxy: Account Coverage & Support

Location/Project	Support Resources
Munich Germany	<ul style="list-style-type: none">➤ Sales: Johann Gerschmidt➤ Tech. Support: Wolfgang Schmidt➤ Project Mgr.: Gertrude Hahn➤ Order Pocessing: Franz Gainer➤ Billing: Franz Gainer➤ Install/Maintain: Thomas Ramone➤ Contracting: Hans Shuller➤ 1st Tier Escalation: Philipe Meier➤ 2nd Tier Escalation: Johann Bach

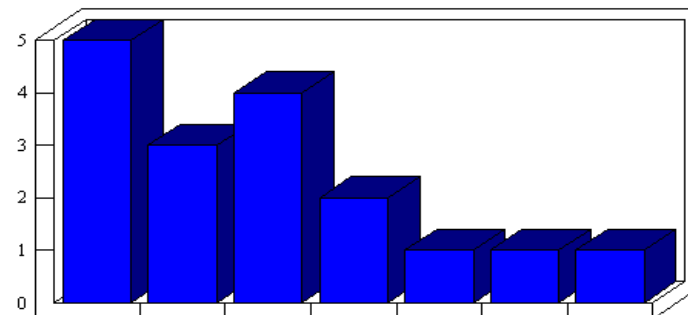
Galaxy: Account Coverage & Support

Location/Project	Support Resources
San Diego, CA	<ul style="list-style-type: none">➤ Sales: Larry Henry➤ Tech. Support: Bill Kennedy➤ Project Mgr.: Tom Gearhart➤ Order Processing: Ken Shipley➤ Billing: Tina Davis➤ Install/Maintain: Louise Williams➤ Contracting: Jim Schwartz➤ 1st Tier Escalation: Larry Griffone➤ 2nd Tier Escalation: Bill Jones

Galaxy: Customer Satisfaction Survey Results

The degree to which our company provides the type and the quality of global account management that your company requires.

Applicable Survey Responses For Question 1

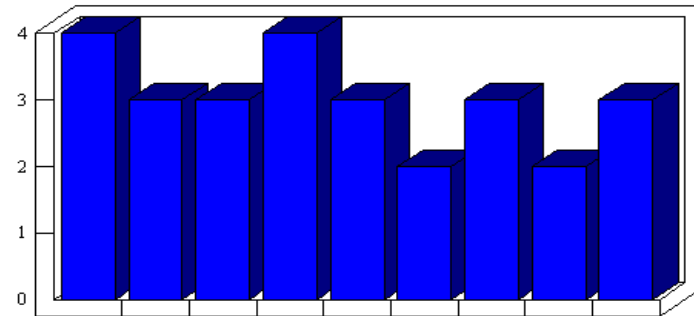


7 Applicable Responses With An Average (Mean) Score = 2.43/5

Galaxy: Customer Satisfaction Survey Results

The degree to which members of our global account team understand your business problems.

Applicable Survey Responses For Question 2

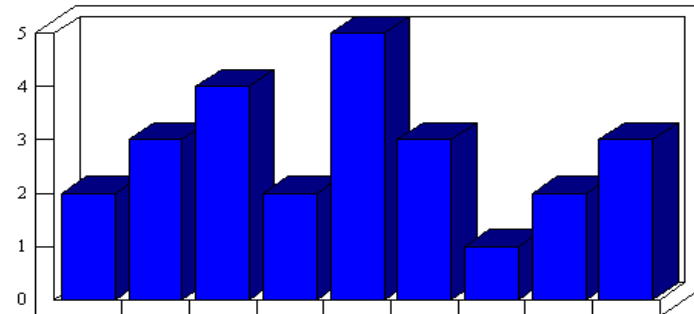


9 Applicable Responses With An Average (Mean) Score = 3.00/5

Galaxy: Customer Satisfaction Survey Results

The degree to which our company offers effective solutions to your business needs.

Applicable Survey Responses For Question 3



9 Applicable Responses With An Average (Mean) Score = 2.78/5

Section 5: Actions

Executing The Plan

Galaxy: Action Plan

Action	Person(s) Responsible	Due Date	Done
Develop A Comprehensive Contact Strategy Using The WIN IT Positioning Matrix.	Henry, Joan	2/11/2005	
Action 1 for resolving a service issue.	Mays, Gerry	10/21/2005	
Action 1 that is needed to execute a given strategy in pursuit of objective(s).	McGaughy, Jack	10/21/2005	
Clarify: Do the decentralized information technology organizations, if any, make buying decisions independent of the central organization?	Murphy, Bill	11/18/2005	
Action n for resolving a service issue.	None Assigned	11/25/2005	
Action n that is needed to execute a given strategy in pursuit of objective(s).	Claus, Santa	12/25/2005	