User Guide Sales Account Plan

The Sales Account Planning app in Creatio helps Sales teams build and track strategic plans for key accounts. The app provides visibility into account goals, financial performance, opportunities, win rates, risks, customer insights, and competitive positioning.

This guide explains how to navigate the app, manage account plans, create objectives, and understand KPI calculations.
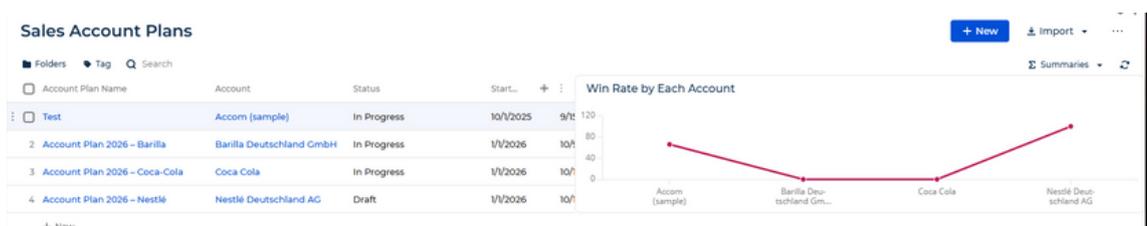
1 **Install the application from Creatio MarketPlace**

2 **Accessing the Sales Account Plan App**
- Open Creatio.
- Select Sales Account Plans from the left navigation panel.
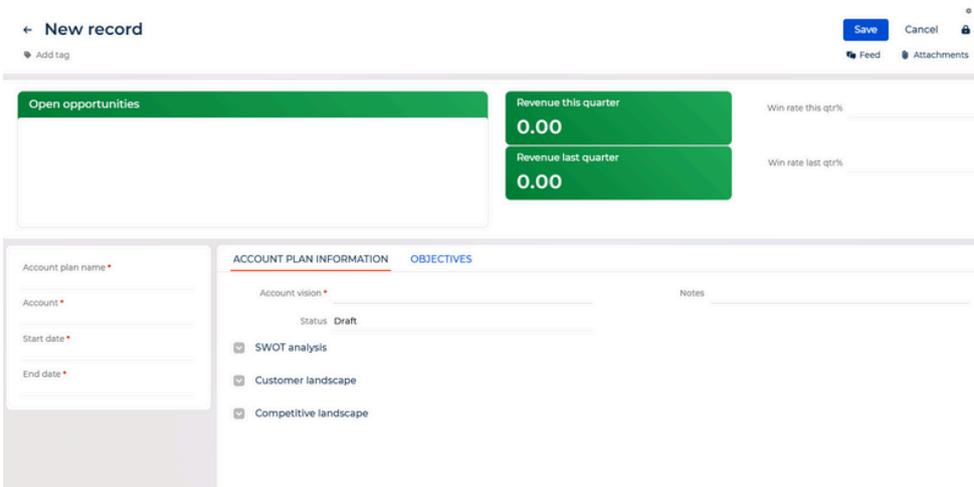- The Account Plan List page opens.

(3) Creating a New Sales Account Plan

1. Click New.
2. Enter the following details:
   ◦ Account Plan Name
   ◦ Account
   ◦ Start Date
   ◦ End Date
   ◦ Status (Draft/ In Progress / Done)
3. Fill in the strategic content:
   ◦ Account Vision
   ◦ Notes
4. Expand the structured sections:
   ◦ SWOT Analysis
   ◦ Customer Landscape
   ◦ Competitive Landscape

Each section includes editable fields such as:
- Strategic Priorities
- Challenges
- KPIs
- Competitors
- Industry Trends

These help build a complete understanding of the customer.

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← **Account Plan 2026 - Accom**
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Open opportunities
Contracting - 33%
Qualification - 67%

Revenue this quarter
1,000.00

Revenue last quarter
2,545.00

Win rate this qtr% 33.00

Win rate last qtr% 66.00

ACCOUNT PLAN INFORMATION   **OBJECTIVES**

Account plan name *
Account Plan 2026 - Accom

Account *
Accom (sample)

Start date *
2/10/2026

End date *
3/31/2026

Account vision * We aim to become the strategic growth partner for this customer by delivering measurable value across their digital transformation roadmap. Our focus is to help them modernize operations, accelerate go-to-market execution, and improve customer engagement through innovative, data-driven solutions

Notes
• The client is currently undergoing a major internal restructuring, which is slowing decision-making and shifting priorities month to month.
• They are also evaluating tool consolidation options in the coming fiscal year, and several stakeholders expressed interest in exploring cost-optimization opportunities.
• Engagement remains steady, but alignment across regional teams is inconsistent and will require proactive coordination.

Status In Progress

SWOT analysis

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SWOT analysis

Strengths
• Strong long-term relationships with key decision-makers, especially in the operations and digital strategy teams.
• The customer has shown recurring interest in innovation and is open to adopting new technologies.
• Consistent year-over-year revenue from existing solutions, creating a stable foundation for expansion.

Weaknesses
• Limited executive visibility; top leadership is not fully aware of the value delivered so far.
• Slow internal approval cycles due to ongoing restructuring within the customer's organization.
• Current product adoption is uneven across departments, leading to inconsistent usage patterns.

Opportunities
• Customer plans to consolidate tools across departments, creating a chance to offer an integrated, end-to-end solution.
• High interest in workflow automation, AI-driven insights, and data governance projects.
• Upcoming global expansion may require scalable platforms and additional regional support services.

Threats
• Competitors are offering aggressive pricing and bundled services targeting the same business units.
• Budget reductions expected next fiscal year could delay or reduce new project investments.
• Leadership turnover may shift priorities away from digital transformation in the short term.

Customer landscape

4   **Understanding KPIs (Dashboard Tiles)**

- **Revenue This Quarter:** The sum of all Closed Won opportunity amounts from the current fiscal quarter.

- **Revenue Last Quarter:** The sum of all Closed Won opportunity amounts from the previous fiscal quarter

- **Opportunity Win Rate This Quarter:** % of opportunities Closed Won this quarter divided by all Closed Won + Closed Lost opportunities this quarter. Only opportunities with an Amount populated are counted.

- **Opportunity Win Rate Last Quarter:** % of opportunities Closed Won previous quarter divided by all Closed Won + Closed Lost opportunities previous quarter. Only opportunities with an Amount populated are counted.

- **Viewing Open Opportunities:** The Open Opportunities widget shows: Opportunity count and Stage breakdown (e.g., Qualification, Contracting)

Auto-refresh behavior:
- KPIs update automatically whenever:
  - an opportunity is added
  - an opportunity is modified
  - an opportunity is moved to Closed Won or Closed Lost
  - an opportunity is deleted
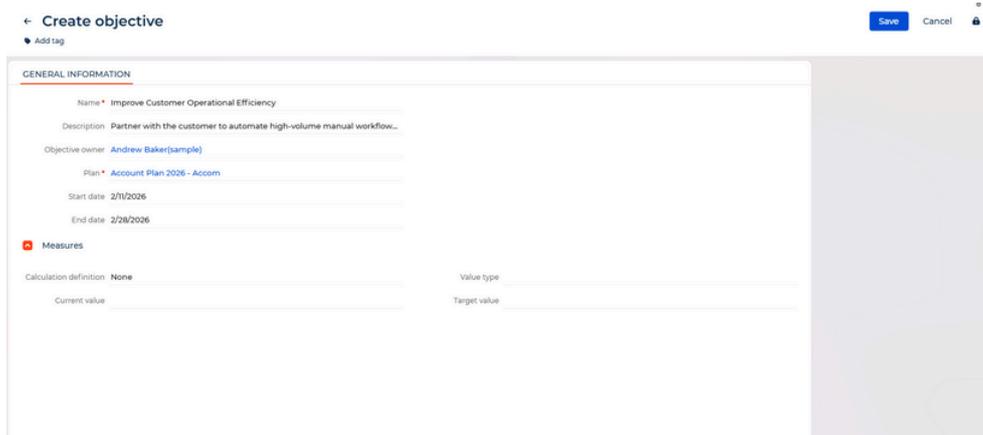
No manual refresh required.
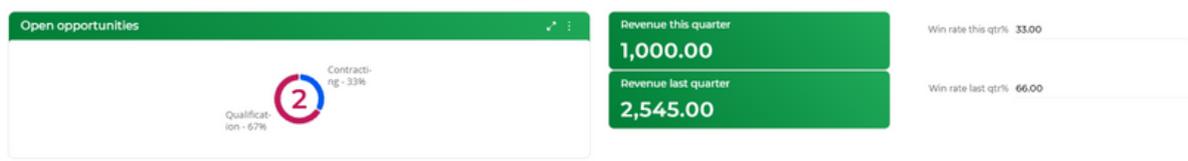
5 Adding Objectives to an Account Plan

Objectives define measurable outcomes you want to achieve within the account.
To create an objective:
- Go to the OBJECTIVES tab in the account plan.
- Click New Objective.
- Enter: Name, Description, Objective Owner, Start Date and End Date

6 Adding Measures to Objectives

- In the Calculation Definition dropdown, select an existing rule such as Opportunity Revenue Target
- On the right panel, select the opportunities that should contribute to this KPI.
- The Current Value field is automatically calculated based on the rule. (Current Value = Sum of Amounts from selected Closed Won opportunities)
- If you Set Calculation Definition to None then enter Current Value and Target Value manually.

7 Summary

The Sales Account Plan App in Creatio provides a structured, automated framework for managing strategic accounts. It combines:

- Strategic planning
- KPI tracking
- Automated win rate calculations
- Revenue insights
- Opportunity health
- Objective measurement and goal tracking

This enables sales teams to plan effectively, measure performance, and align with customer goals.