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Joint Account Planning

Joint account planning is the activity of meeting with your partners and exploring business opportunities within specific accounts. It's fine to begin with an unstructured process and determine if it makes sense for the organizations to explore a deeper relationships within those named accounts. A key issue to address is identifying gaps in your company's offerings and where the companies can begin to complement each other's business.

The joint account plan is designed to help document a joint selling agreement, identify resources, and plan how to win together.

Here is an example of content to be included in your joint account plans.

A comprehensive plan includes:

* Success metrics for both teams and a joint success metric
* Customer overview and details
* Initiative/Project name
* Competition
* KPI and customer milestones
* Joint strategy and solution
* Leveraging joint investments & assets needed
* 90-day action plan with action owners and due dates
* The teams have a regular cadence/ rhythm

Opportunity Selection Considerations:

* Customer considerations
* Account team participants
* Solutions and capabilities
* Leadership commitments