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One account, mapped end to end.

An account map shows, for each priority account, who decides, how strong the relationship is and what the next step is. This example is made up: a supplier of planning software and a logistics group with three operating companies. In practice you build the map with the account owner, and it lives in your CRM.

The account

ACCOUNT	Example Logistics Group (fictitious)
STRUCTURE	Holding with three operating companies, about 900 staff
YOUR OFFER	Planning software for warehouse and transport
90-DAY OBJECTIVE	A meeting with the COO and one opportunity in the CRM at operating company B

Why now

Q1	New COO from outside, tasked with aligning planning across sites.
Q2	Operating company B opens a second distribution centre.
H2	Contract with the current planning supplier ends; procurement is preparing a tender.

The buying group

Each role linked to a named contact in the CRM

Role	Where	What they win	Why they might say no	Relationship	Next step
Economic buyer	COO, holding	One way of planning across all sites	New in the role, wants to look around first	○ None yet	Introduction through the director of operating company A
Champion	Head of planning, company B	Fewer fires to fight at the new DC	Little time during start-up	◔ Limited	Short piece on the first hour of a disrupted plan
Technical evaluator	IT architect, holding	A WMS integration they can manage themselves	Another vendor to secure and maintain	◔ Limited	Technical conversation with your pre-sales
User	Planners, company A	A plan that works without Excel next to it	Wary of another switch	● Strong	Ask for a reference for B
Procurement	Procurement, holding	A supplier that fits the tender	Only works with known parties	○ None yet	Check the procurement route early
Gatekeeper	Security officer	Certainty about data and access	Sees a cloud integration as a risk	○ None yet	Security pack ready before anyone asks

● Strong ◔ Limited ○ None yet

More on account-based work: stoftotgroei.nl/en/challenges/cant-get-into-target-accounts

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Where you stand, and what you do in the next ninety days.

The map makes three things visible: where you have coverage, where the opportunity is, and which step comes first for each gap.

Coverage per operating company

Example Logistics Group
Holding · COO and procurement decide

Operating company A

EXISTING CUSTOMER

● Strong

Planners are happy; the director is a possible advocate

Operating company B

OPEN OPPORTUNITY

● Limited

New DC; head of planning knows you from an event

Operating company C

WHITESPACE

○ None yet

No contact yet; win B first as a reference

What the map makes visible

Coverage
Strong at A, absent at holding level. So every site is won on its own, one at a time.

Opportunity
B is credible thanks to A. The new DC is the trigger, A the reference that opens the door.

Action
One step per gap with an owner and a date, visible to sales and leadership.

The first 90 days

MONTH 1

Map and validate

Build the map with the account owner, check contacts, set it up in the CRM.

MONTH 2

Engage

Warm introduction to the COO, technical conversation with IT, small session with planners from A and B.

MONTH 3

Review and convert

Compare coverage and opportunities with the baseline; decide what to scale to C.

The yardstick, agreed at the start

6 of 6
roles with a name in the CRM

3
roles with at least one two-way contact

2
follow-up meetings, one of them with the COO

1
opportunity in the CRM at company B

Rules of engagement

- ☐ One owner per contact.
- ☐ At most one touch per person per week, across all channels.
- ☐ Nothing goes out before the account owner has checked the contact.
- ☐ Everything in the CRM, not in a spreadsheet.

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Your priority account.

Fill in this sheet with the account owner. Start with the trigger: without a reason why now, every contact becomes a cold approach.

Account

Structure (parent and sites)

90-day objective

Why now? (three triggers, with date and source)

Role	Name and title	What they win	Why they might say no	Relationship	Next step, owner and date
Economic buyer				● ● ○	
Champion				● ● ○	
Technical evaluator				● ● ○	
User				● ● ○	
Procurement				● ● ○	
Gatekeeper				● ● ○	

● Strong ● Limited ○ None yet

Yardstick after 90 days: named roles · two-way contact · follow-up meetings · opportunities in the CRM

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