

Territory Management

Account Planning



The Safe Choice



Account Planning

What should we do when we get there?



The Safe Choice

Account Planning

- Does your team predominantly go where called to go?
- Does the prep for the call often occur in the McDonald's near the customer?
- Are the accounts aligned with what Hyster and your dealership do well?
- If you asked for a game plan would the answer most often be “demo a truck” or “get them a quote”?

Account Planning

Why do we do it?

- o Numerous Competitors
- o Customer Sophistication Continues to Grow
- o Variety of Needs and Wants of Customer
 - o Must be Aligned with Dealer / Hyster Capabilities
- o Money and Manpower are both Limited Resources
 - o Apply both in areas of Greatest Opportunity

Account Planning

How do you start?

- o 70% Rule
- o Businesses with 10 or more units = 70 cents on the dollar spent
- o Test your base
 - o Run a report of your current clients
 - o Extend to those with competitive fleets
 - o TAP, EDA, Leads, Competitive Intel
- o Create a Top 50 list
 - 1) Most money to spend
 - 2) Use Products and Services Compatible to my Offering
 - 3) Greatest Dissatisfaction with Current Supplier

Account Planning

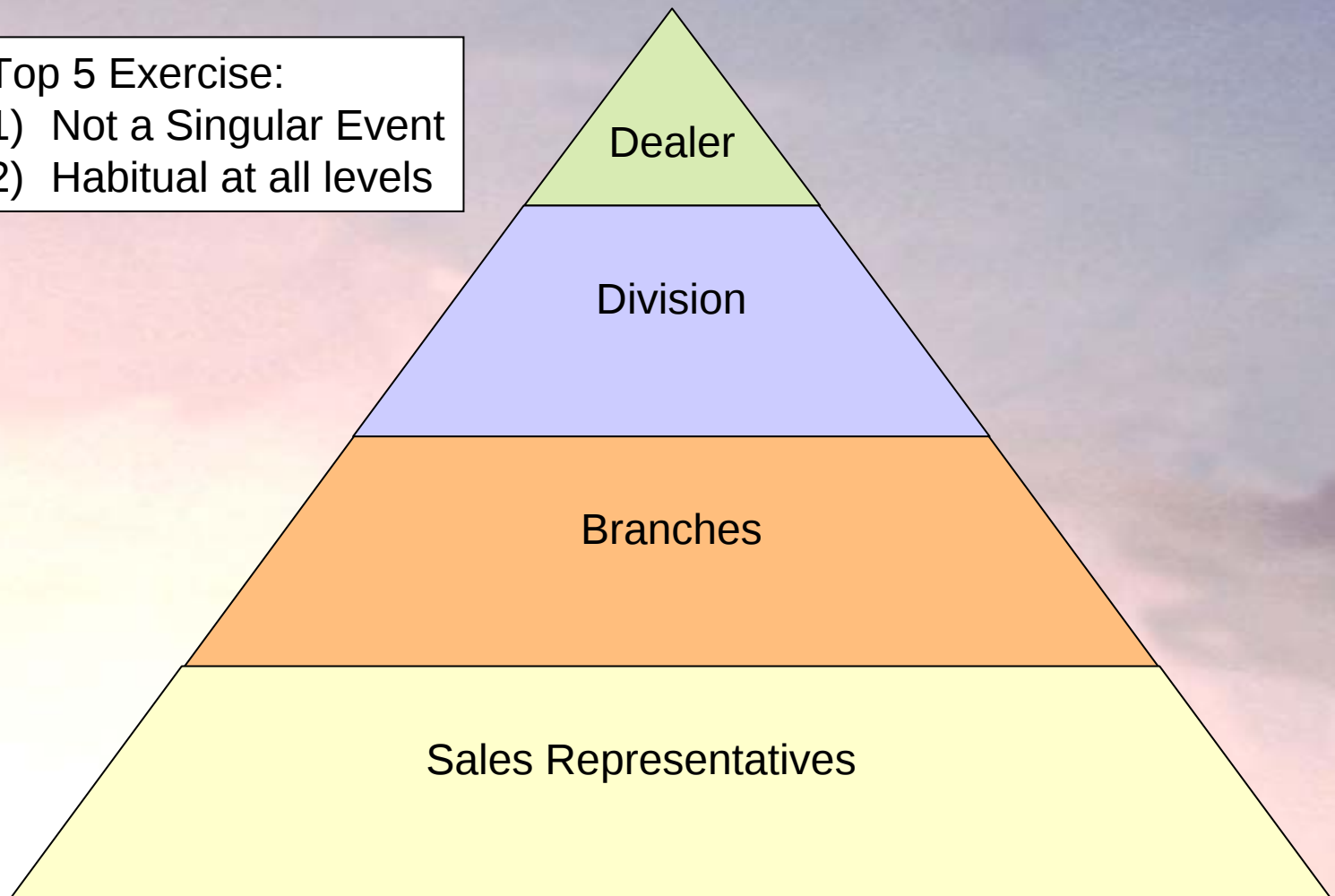
Who do I target first?

- o Prioritize your Top 50
 - 1) Rank each for Desirability and Vulnerability
 - a. Fleet Size
 - b. Class of Product
 - c. Competitor
 - d. Maintenance
 - e. Personnel
 - f. Buying Motives
 - 2) Get input from all dealer touch points
 - a. Unit Sales Call Reports
 - b. Aftermarket Call Reports
 - c. Technician Comments
- o Based on ranking, select 5 accounts

Action Planning

Top 5 Exercise:

- 1) Not a Singular Event
- 2) Habitual at all levels



Account Planning

How do I tackle the Top 5?

- o Create Account Conquest Team
 - o Leader may vary, but make it a cross-functional standing committee
 - o Branch Manager
 - o Sales Representative
 - o Parts
 - o Rental
 - o Service
 - o Bring in as needed
 - o Technician
 - o Counter People
 - o Accounts Receivable

Account Planning

How does the team work?

- o Discuss Everything
 - o Hard facts
 - o D&B
 - o Websites
 - o Rumors
 - o Coffee Shop Talk
 - o Family and Friend Links
- o Confirm Top 5
- o Weekly War-room Meetings
 - o Salesperson owns the account
 - o Plan of Attack should be the Group's

Account Planning

What is the team's objective?

- o Broad Involvement to establish ways of bringing value to the account.
 - o Book Value Assessment
 - o Basic Utilization Study
 - o Cost Reduction Seminar
 - o Productivity
 - o New floor design
 - o Uptime
 - o Contract Maintenance
 - o ITC / Plant Invitation
 - o Bonus Depreciation Conference Call
- o Pick a point of entry and an approach
 - o Before throwing "yellow iron" at it
 - o Or, money for that matter

Account Planning

- Determine if there is alignment
- Determine Point of Entry at the Customer
 - CFO
 - Warehouse Manager
 - Maintenance Supervisor
 - Safety Manager
- Determine best dealer personnel to address that point of entry

Account Planning

- Formulate the Approach
 - Sales Representatives should be adding value or taking pain away.
 - Recognize there are multiple Influences in the Account
 - Knowledge gathering and relationship building months before RFQ
 - Helping the customer...
 - **Reduce Costs**
 - **Increase Productivity**
 -
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Account Planning

Cost Reduction:

- Labor and benefits
- Parts
- Rental
- Fuel
- Outside service
- Acquisition Methods
- Unnecessary purchase of equipment
- Fleet Management

*Others:

- CARB Ratios

Productivity Gains:

- Storage Systems
- Material Handling Flow
- Technology
- Specialized attachments
- Fuel Storage location
- Electric vs IC
- Focus on “core activities”
- Reduction of Off Site Storage

Account Planning



Prospects

ABC

Plant Tour

Professional Fleet Assessment

DEF



Clients

123

Book Value / Asset Inventory

Quarterly Maintenance Review

Lease Expiration Review

456

Account Planning

What is the outcome?

- o In front of more customers at the right time who are willing to spend money.
- o Less fragility in the account base
- o More controllable income streams
- o Avoids commodity mentality
- o Engages the entire team for positive results everyone can enjoy