Mindjet®

Getting Started Guide

Using Mindjet Software and Templates for Sales Account Planning and Management

"As a result of using Mindjet at every stage of the sales process we have seen our sales cycle reduced significantly… This means we have closed more deals and moved more deals into the current quarter"

—Stu Schmidt, Vice President at WebEx

You know the challenges involved in effectively managing a complex enterprise sales process: The enterprise account team is unable to "get on the same page" with all aspects of the account, leading to poorly coordinated account planning.

Sales management lacks the complete view of sales team activity needed to provide effective coaching and gain the insight needed to accurately validate forecasts.

Your sales teams lack a central place to access and manage contextually relevant account information. The proverbial needle in the haystack results in missed data and wasted selling time.

Mindjet® software lets you lay out and communicate a unified view into complex accounts, ensuring that team activities are coordinated and the deal gets closed in the most efficient manner.

This guide will walk you through how to get started using Mindjet software and custom templates to facilitate team collaboration and more intelligently leverage information to drive more effective Sales account planning, management, and reporting. In particular, the guide will walk you through the Account Plan map template.

All the capabilities we'll show you are available with Mindjet software, which includes Mindjet MindManager 2012, Mindjet Connect,® and Mindjet Mobile.

Mindjet MindManager 2012

Information mapping software that fosters active collaboration, enabling users to brainstorm, plan, strategize, and present more effectively using interactive information maps that illustrate the big picture, yet contain all relevant details in a single view. MindManager is integrated with the Mindjet Connect free online service, so visual Mindjet maps can be easily shared across teams and devices.

Mindjet Connect
Free and Business Editions

An online service for sharing and collaborating that extends the value of mapping to your entire team or organization. Mindjet Connect allows you to securely store and manage Mindjet maps and files online, invite anyone to contribute and collaborate without the need for additional software, and access your work anytime, from virtually anywhere, and from any device.

Mindjet Mobile

Create, collaborate, and access your maps and files on the go. Use Mindjet's mobile apps to take your work with you. Stay in sync with your team anytime, anyplace, and from any mobile device.

Account Plan Map Template

In this guide, we're going to use Mindjet's standard sales Account Plan template. Let's walk through a scenario in which you, the sales executive, are collaborating with your account team to put together an account plan for XYZ Corporation, a Fortune 500 company. The account team is geographically distributed.

The template is just a starting point. You don't need to use all of the elements, and you can customize it to your own needs.

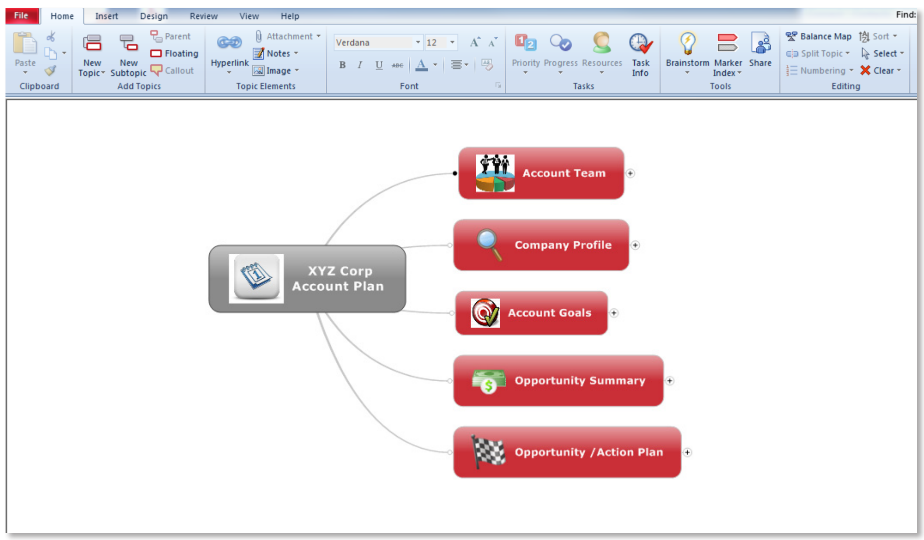
Let's assume the account team includes the Sales Exec, Marketing Manager, and Solution Consultant (SC) Manager, and they are in separate locations. This example assumes that you, the sales exec, have chosen to use MindManager 2012 to create Account Plan maps. You access Mindjet Connect's sharing capabilities directly from within MindManager to take advantage of social media integration and to share the map with the team. The rest of the account team simply logs into Mindjet Connect to review and contribute to the map—since Mindjet Connect includes map creation and editing capabilities, they can edit the map right from their browsers.

After you first share your Account Plan map via Mindjet Connect, a best practice is to continue to access your map via the Mindjet Connect interface. This will give you version control, including check in, check out capabilities.

To follow the steps, simply download the template and open it in either MindManager 2012 or Mindjet Connect.

Getting Started

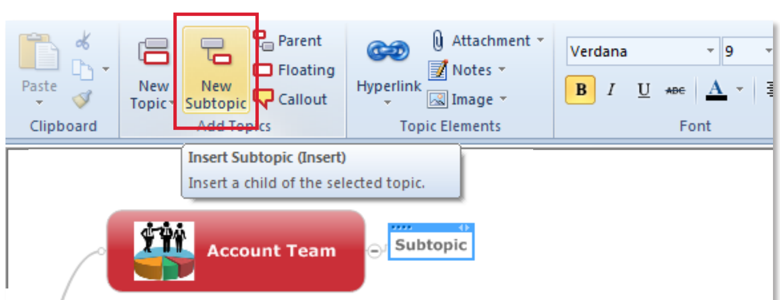
When you open the template, it will look like this. If you're not already familiar with the menus, take a moment to review the ribbon and the map topics



Creating Topics and Subtopics

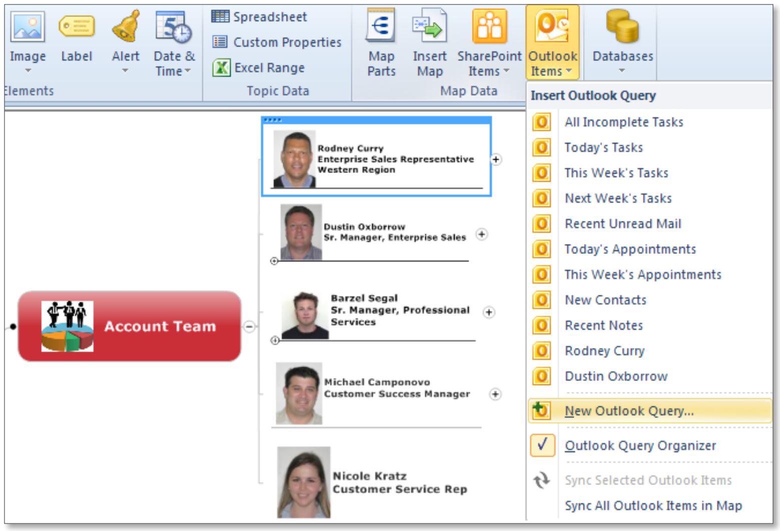
The first thing you might want to do is enter the information on the team working on the account.

Click on Account Team and hit the "Insert" key, or you can hit New Subtopic in the taskbar.



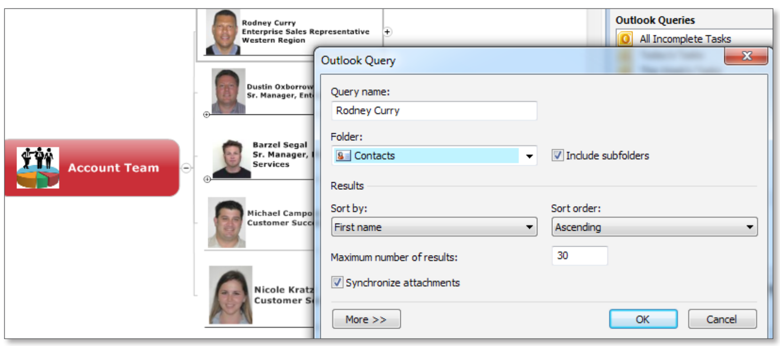
Creating Topics and Subtopics (continued)

To avoid duplicating data input you can access the Outlook® contact information of your team.

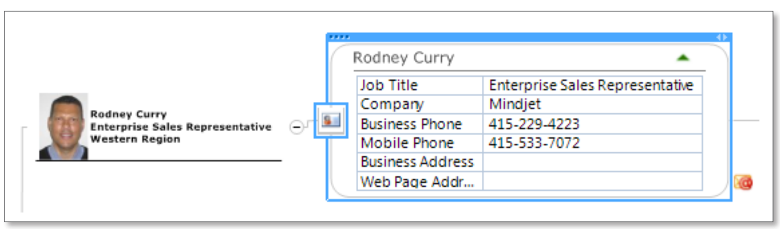


Click the Outlook items icon and select New Outlook Query.

In the box that opens enter the team contact you are looking for. MindManager will search and attach all the Outlook contact information available.

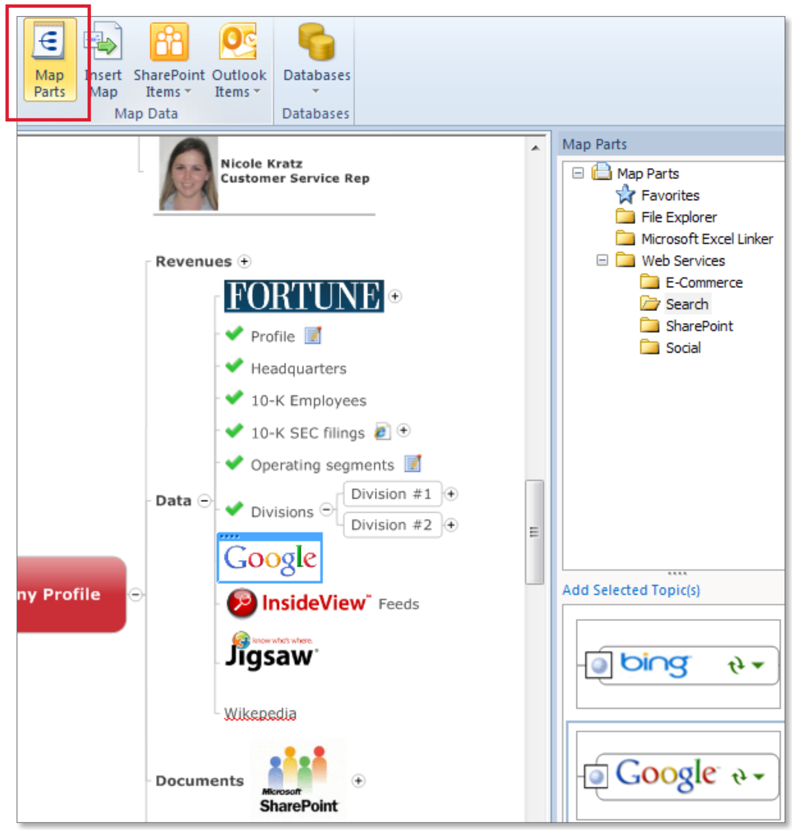


Now you can email team members directly from the account planning map.

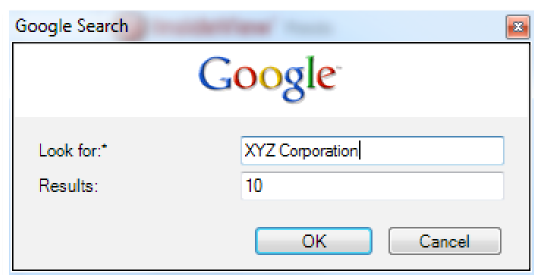


Centralizing External Information

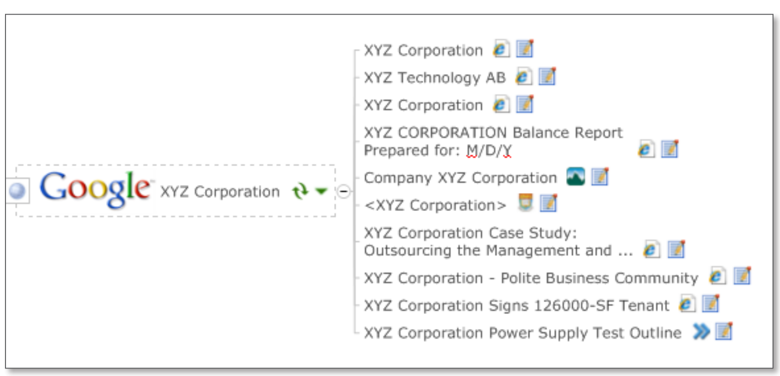
Next, use Mindjet software to consolidate and share detailed information about the account. By creating a central account view using Mindjet, you can aggregate and share information from company websites, public sites like Wikipedia,® Google® search results, LinkedIn® searches, and even Twitter® feeds, as well as linking to information contained in salesforce.com or other CRM systems.



In this example, you can attach a Google search result in MindManager by clicking on Map Parts and selecting the Search folder under Web Services. Select Google and enter “XYZ Corporation” in the search box.

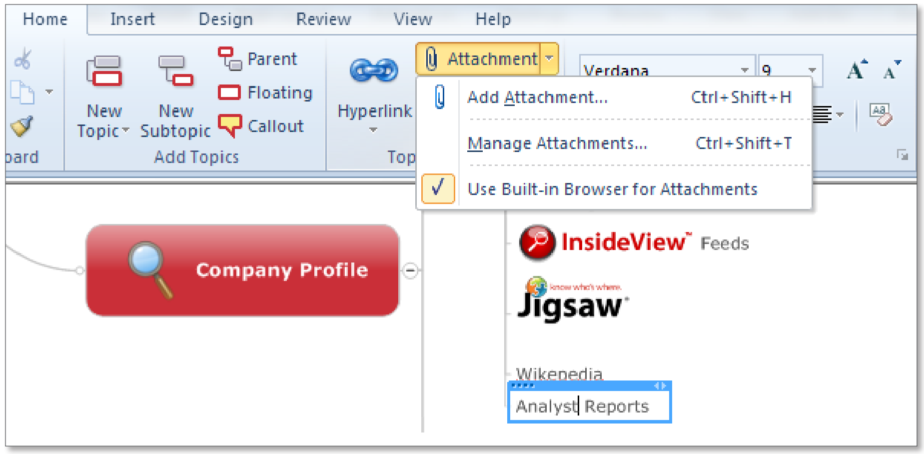


You’re search results will automatically be attached to your map.

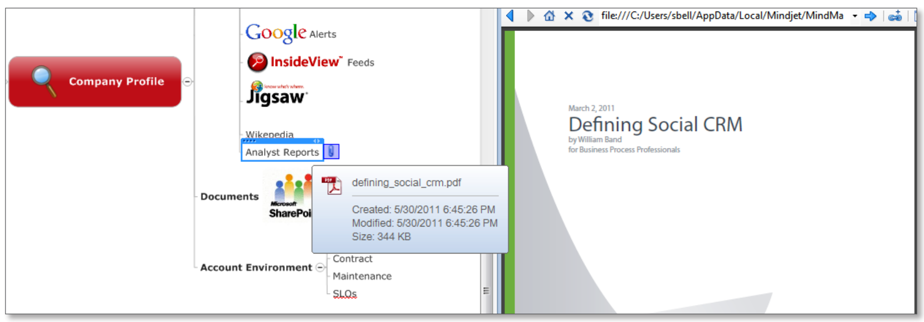


Incorporating Market Data
It's easy to add attachments and hyperlinks to industry information, such as analyst reports. This way, you and your colleagues can simply click to view all relevant information in context.

Just click "Attachment" and add your report.



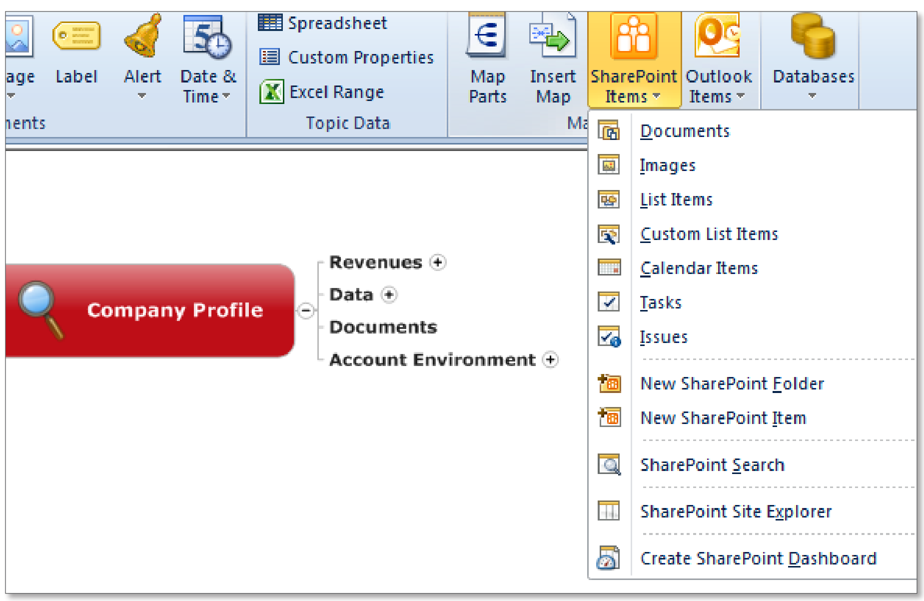
Then, when anyone wants to access the report, they just click on the link and the report will display within the map workspace.



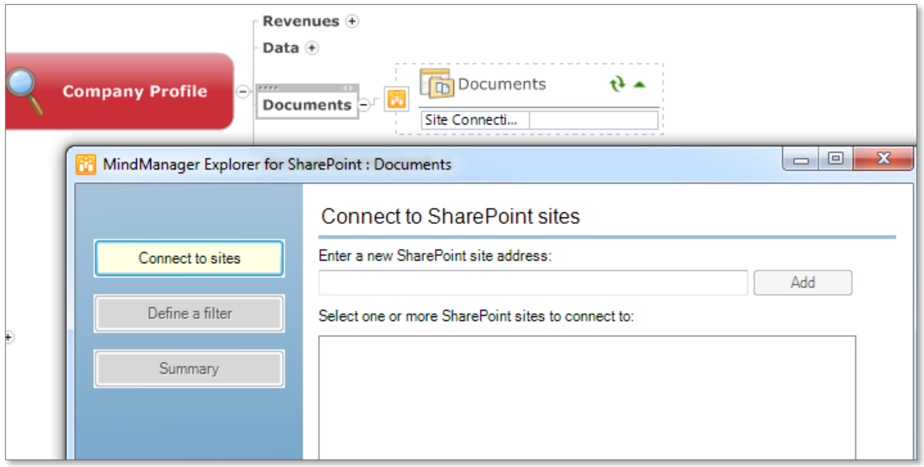
Centralizing Internal Information
You can collect content relevant to this account or your sales process in general, such as proposals, presentations, and sales sheets.

If you are a Microsoft® SharePoint® user, MindManager 2012 provides an integration for easy access to these documents.

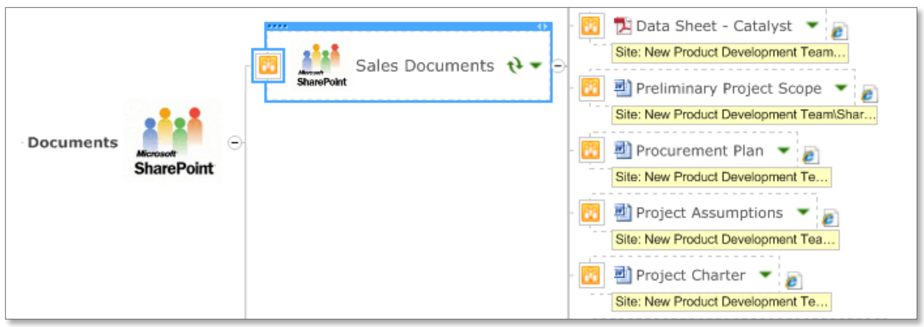
To access SharePoint through your map you need to have a SharePoint account and URL.



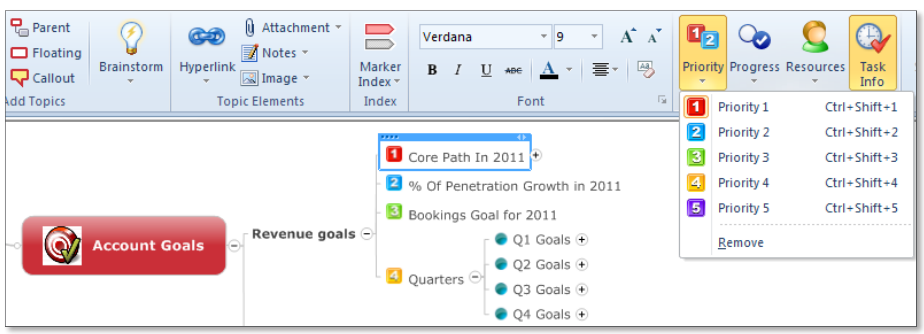
Centralizing Internal Information (continued)
Click SharePoint Items and enter the relevant URL(s) to the documents and other content you want to access.



The links will then be attached to your map.



You can lay out your financial goals for the account and then prioritize your goals using the drop down menu. Reviewing the priorities in a visual format is a good way to lead discussions with sales management and obtain their buy-in.



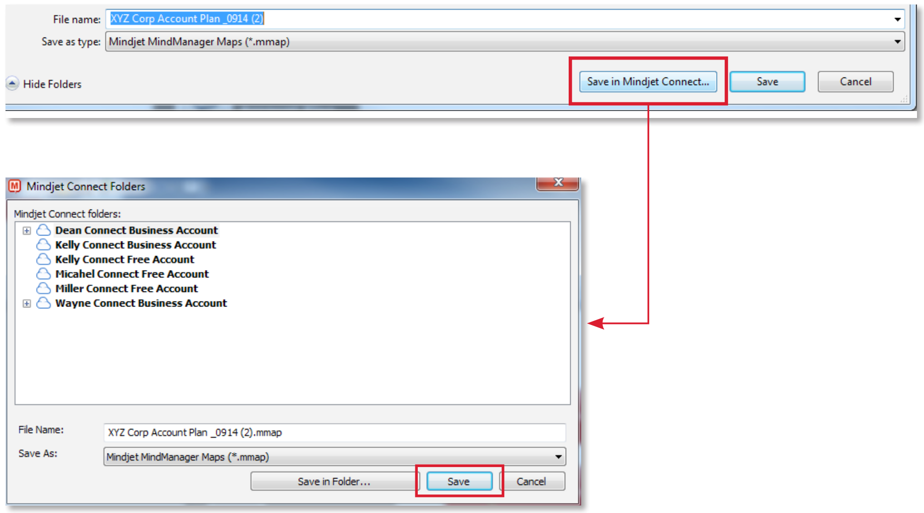
Sharing

A key part of successful team selling is ensuring everyone with an assigned task is on track and everyone is aware of everyone else's activities.

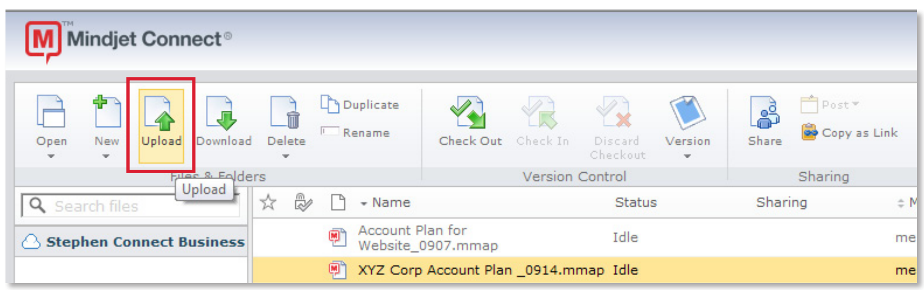
With Mindjet Connect, you're able to communicate account status and collaboratively view and edit maps with your account team via any web browser.

Use Mindjet Connect to share your map with the rest of the team so they can begin to collaborate on the Account Plan.

Click File/Save As, then click on Save in Mindjet Connect.

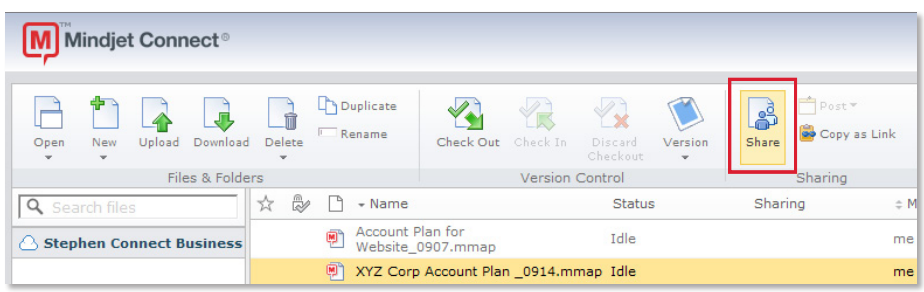


Then from MindManager, go into Mindjet Connect and upload your map by clicking the upload button. Then click the share button.



You'll be prompted to set your sharing rules, identifying recipients as guests or members;* and whether they have read only or edit capabilities.

*Members are a feature of Mindjet Connect, Business edition.



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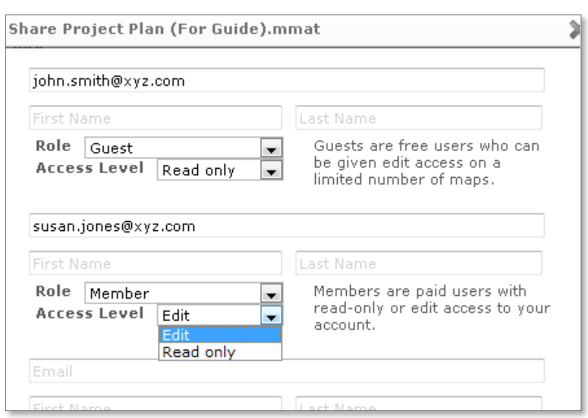
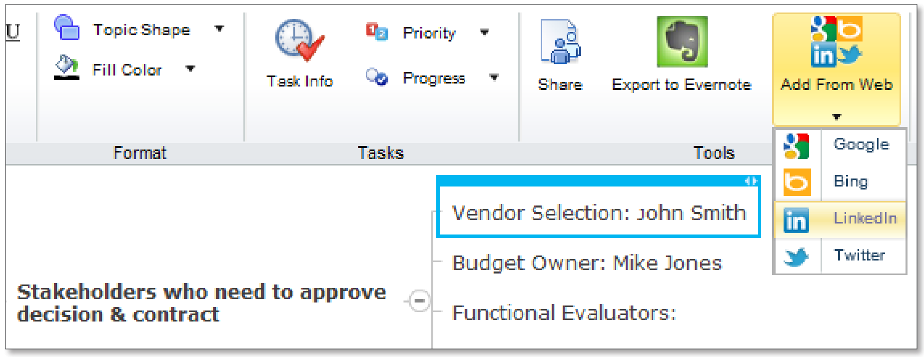


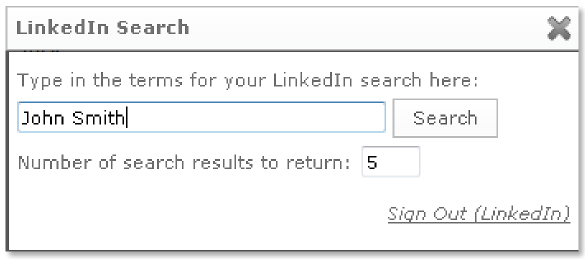
Co-Editing

Maybe one of your account team members wants to start entering key stakeholders in the Opportunity Summary part of the Account Strategy task.

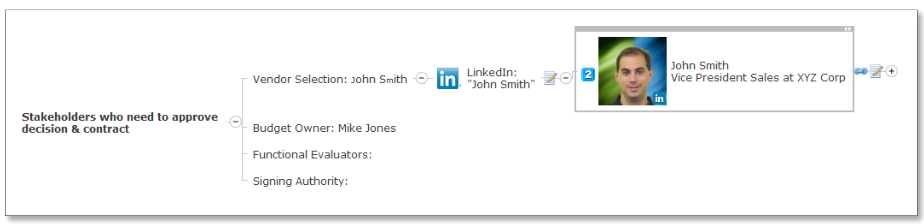
Since key accounts have LinkedIn profiles, he can link to those pages directly.

In Mindjet Connect, he just clicks the Add From Web icon and selects LinkedIn from the drop down menu. He'll be prompted to search for your contact.





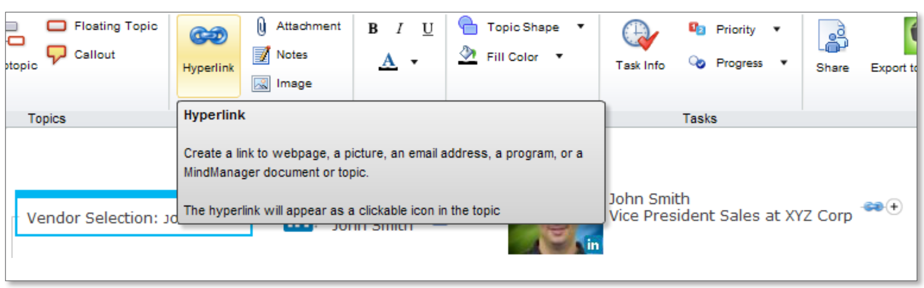
The LinkedIn results will attach to the map.



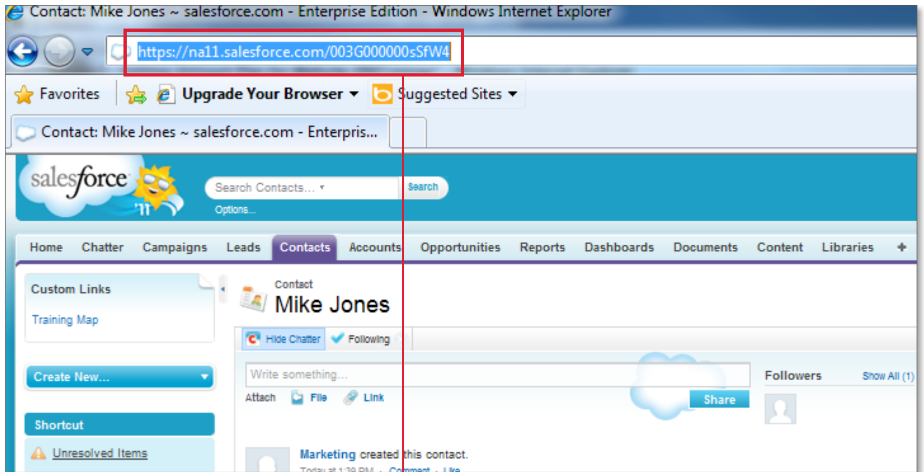
CRM Integration

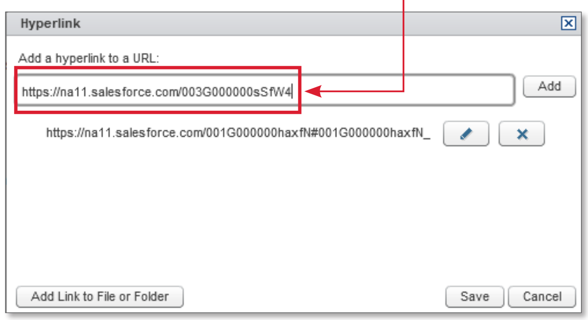
If you use a CRM system like salesforce.com, you can insert a link from MindManager or Mindjet Connect to that contact record in the CRM system.

From Mindjet Connect, just click on the Hyperlink.

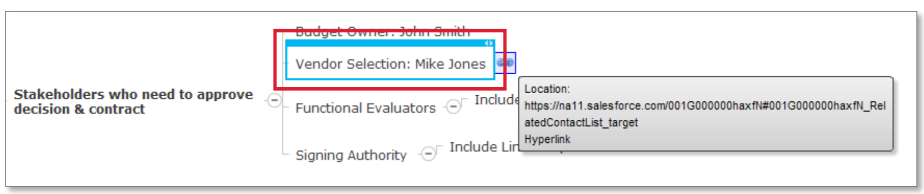


Then go into salesforce.com, select the link to the contact, and then paste it into the box.





Now you have a direct link from your map into the specific salesforce.com contact record.

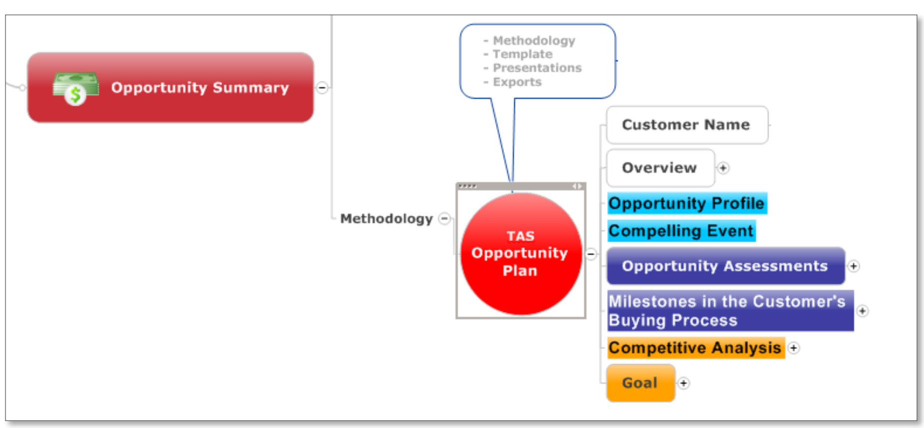


You can create these links for any item in Salesforce in order to centralize relevant information about your account within your map, and avoid replicating data.

Embedding Sales Methodologies

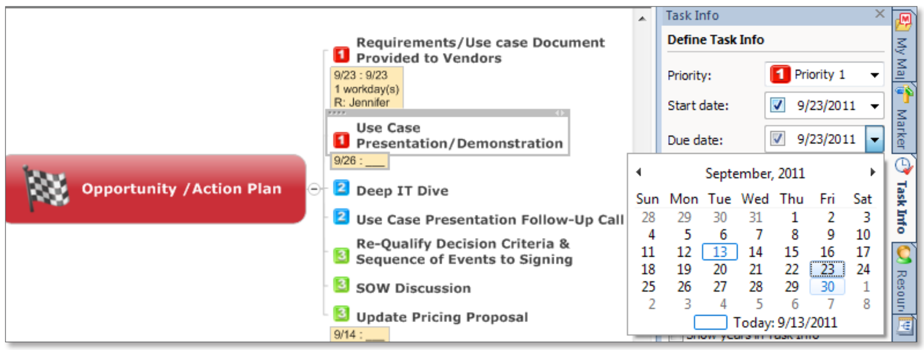
As a more advanced practice, you can embed your existing sales process into your map, such as Miller Heiman, TAS or your own custom process.

It's easy to add topics and subtopics that match the key steps in whatever sales methodology you're using, then add the appropriate action items to those topics.

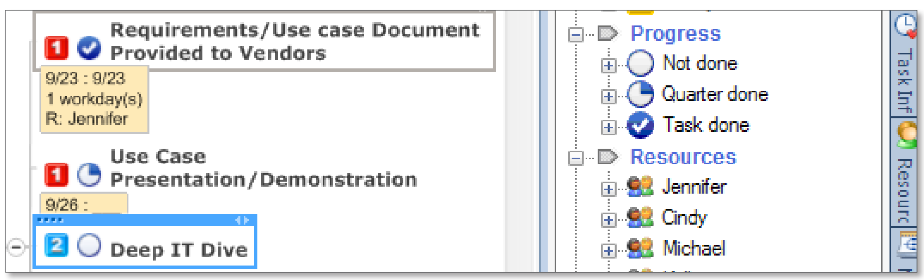


Task Management
Now you can use MindManager to quickly move from concept to action plan.

Identify and prioritize all the necessary tasks, then assign task duration and ownership.

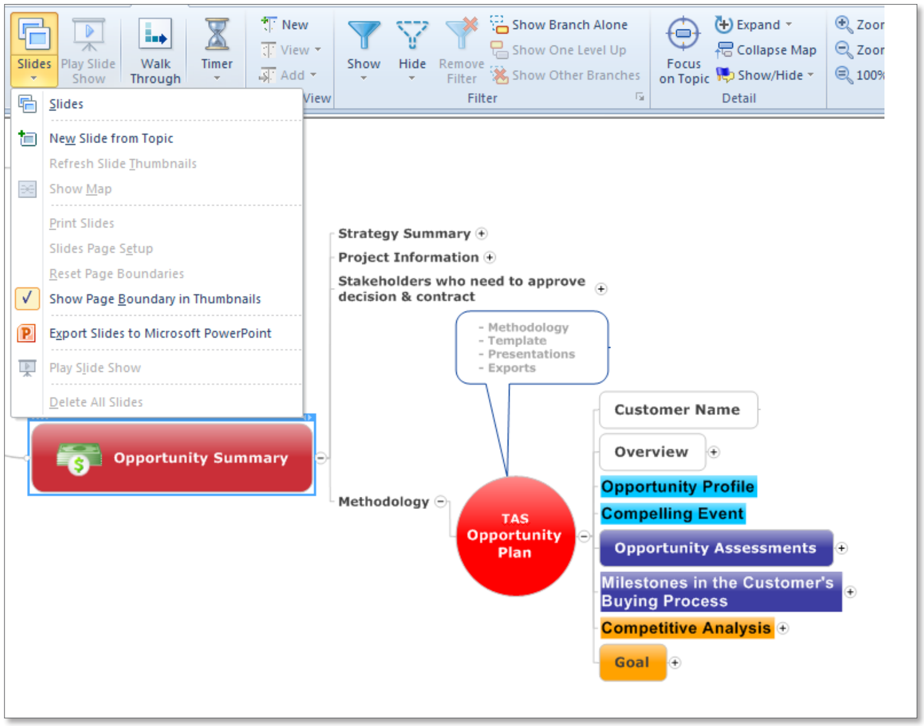


Use the visual indicators to easily track the level of completion for each task. Just click on the Task Info tab and click the Progress drop down menu.



Presentation

Finally let's assume your sales manager has asked for an impromptu review of your Account Plan. No problem. Just click on View, Slides, and New Slide From Topic, and the selected topics in your map are converted to slides.



This Concludes the Getting Started Guide.

You should now be able to build out your own Sales Account Planning maps using some of the powerful features illustrated in this guide in order to enhance your ability to capture, organize, plan, and act on ideas and information with your clients in a visual environment that encourages collaboration.

Other common Sales Account Planning map templates available for you to use include:

- Territory Plan
- Proposal Development

Please visit our website to find more advanced tutorials and other resources.

We'd Like Your Feedback!

Please take a moment to tell us how we can further help you.
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