

# Portfolio Management Process Program

Version 7.0

## Business Issue

Any salesperson charged with the responsibility of managing a portfolio of accounts faces the following issues:

- Account retention and development
- Strategic account development
- Resource allocation

With a finite level of sales, marketing, and consulting resources available, OnTargets' Portfolio Management Process (PMP) helps portfolio managers direct their efforts toward ensuring they achieve revenue targets, while utilizing and leveraging their resources to develop strategic accounts and protect established account relationships against competition.

## What is the Portfolio Management Process?

The Portfolio Management Process (PMP) is a structured methodology for sales professionals responsible for covering, penetrating, retaining, and growing a portfolio of accounts in a 'direct sales' business model. A typical portfolio contains a selected set of named accounts (organized by industry vertical, geographic region, etc.) for which a sales history may or may not exist. A portfolio often contains strategically important accounts that represent high business potential for the sales organization. PMP shows sales professionals how to assess their accounts and apply the right strategies to each, resulting in an optimal mix of

resource allocation and revenue achievement. One result of PMP is that attendees gain unique insight into their most strategically important customers' business drivers and business initiatives, which leads them to identify new revenue opportunities and understand the full revenue potential of these accounts.

## What Are the Business Benefits?

- A clear view of the portfolio's potential
- A plan that helps prioritize investments in, and returns from, the portfolio
- A process for managing portfolios of accounts that can be regularly applied
- Improved collaboration among the members of the "virtual" sales team

## What Happens During the Portfolio Management Process Program?

**Length:** 2 days

**Agenda:** During the program participants will:

### Analyze their Portfolio

- Objectively prioritize their portfolio into 'A', 'B', and 'C' accounts based on current and potential revenue
- Understand and quantify the short-and long-term business potential of the entire portfolio
- Understand where to utilize partner capabilities and resources across the portfolio

**Develop their 'A' Account Business**

- Develop new business opportunities in their strategic 'A' accounts

**Determine how to Manage Opportunities and Customer Relationships**

- Manage the opportunity pipeline across their portfolio
- Maintain and grow key customer relationships

**Market to the Portfolio**

- Leverage marketing and build a portfolio-marketing plan

**Review and Implement the Portfolio Plan**

- Build a detailed Portfolio Map that matches appropriate solutions to account needs and helps identify total, portfolio-wide revenue potential

- Develop a specific Account Plan for each strategic 'A' account, with an emphasis on developing new business and critical resource investments
- Build and implement a comprehensive Portfolio Plan that includes 'B' and 'C' accounts

**Who Should Attend?**

The program is designed for sales professionals with "direct sales" responsibilities for account portfolios, and their virtual teams (presales, product, and service specialists)..



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