Bigtincan™

Account Transition Checklist

- ❏ Initial Research (SFDC, Notes, Mkt, Website,)
- ❏ Meet with the internal team
    - ❏ Identify Key customer personnel (Champion, Executive Buyer, Admin, Influencers)
    - ❏ Contract data (renewal date, nuances, price protection, advance notice)
    - ❏ Customer Use case, products, challenges, concerns
    - ❏ Has the client launched yet?
- ❏ Draft the Target Account Plan (Top3 Accounts)
    - ❏ Account information
    - ❏ Exp / Cross sell opportunities (white space)
    - ❏ Market trends
- ❏ Review / Use applicable tools
    - ❏ SFDC
    - ❏
- ❏ Intro meeting scheduled with client (external Team) __________
    - ❏ Follow up in email
    - ❏ Next client meeting _______
- ❏ Schedule QBR / EBR __________
    - ❏ Intros to key influencers, Executive Buyer,
    - ❏ Referrals
- ❏ Is the client at risk?
    - ❏ Do you need to develop a Save plan
- ❏ Identified an Executive Sponsor?
- ❏ Client concerns
    - ❏ Open tickets
    - ❏ Payment issues
    - ❏ Adoption
    - ❏ Lose Champion
- ❏ Update Salesforce
    - ❏ Health Status / Risk (green, yellow, red)
    - ❏ Notes / Next Steps
    - ❏ Contacts
    - ❏ QBR Schedule