



## ALTIFY ACCOUNTS

# Simplify revenue growth in your key accounts

Focus on accounts with the highest probability of growth by deepening relationships and building trust natively in Salesforce.



**Deepen relationships, identify new opportunities, and increase revenue.**

### ALTIFY Opportunity Map

Account Manager

#### Ancaster Engineering

Acastor Engineering					Potential	Current	Won
Total	Product A	Product B	Product C	Product D			
\$0.90M <div>3</div>	\$0.40M <div>1</div>	----	\$0.50M <div>2</div>	----			
\$1.20M <div>5</div>	----	\$0.47M <div>2</div>	\$0.50M <div>2</div>	\$0.23M <div>1</div>			
\$0.91M <div>3</div>	\$0.41M <div>1</div>	\$0.10M <div>1</div>	----	\$0.20M <div>1</div>			
Plan Total							
\$3.01M	\$0.81M	\$0.57M	\$1.00M	\$0.43M			

## Identify new cross-sell & up-sell opportunities

See where your solutions have been deployed and uncover whitespace where you can deliver additional value.

Map current, potential and closed-won opportunities to identify whitespace

Quickly assess account relationship and insight maps to validate the who and why behind opportunities

### ALTIFY Plan Overview

#### Details

Target

Duration

#### Opportunities

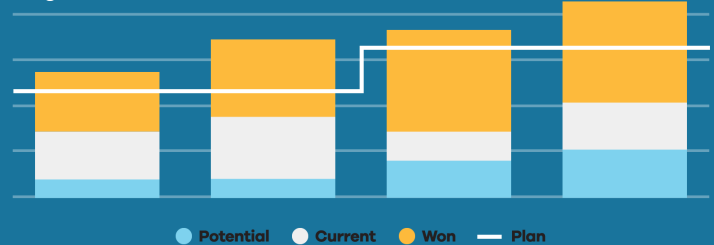
Potential

Won

#### Team Members

NC JK RQ TC

#### Progress



## Quick & simple account transparency

Visualize account plan progress, highlighting next steps for potential, current, and won opportunities.

Review, connect and collaborate on your account plan across the revenue team

Gain clarity with objectives, actions and customer insights

# Operationalize your account management and planning to drive sales success.

Altify Accounts combines strategy and methodology into intuitive technology to successfully operationalize and instill account planning best practices and behavioral change.

## Track plan progress

- Set goals and measure KPIs
- See a snapshot of plan status
- View plan timelines

## Document account plan details

- Create comprehensive strategic plans from templates
- Track to account plan completion
- Break down details based on territory or divisions

## Map untapped opportunities

- Identify open whitespace potential
- Maintain pipeline integrity and map potential opportunities
- See total addressable market data

## Collaborate on account reviews

- Effectively coach sellers with precise account insights
- Uncover questions, vulnerabilities, and recommendations
- Leverage the whole revenue team to progress account plans



## Map relationships

- Understand key players
- Document buying role and support status
- Identify influences and conflicts among the buying team

## Map insights

- Uncover customer goals, initiatives, pressures, and obstacles
- Refocus sellers on buyer needs
- Share insights across the revenue team

## Execute objectives

- Assign actions across the revenue team
- Align to critical objectives
- Foster accountability and collaboration

## 100% Salesforce native account planning

- Methodology embedded in Salesforce
- Operationalize account planning
- Win and retain revenue over the long-term



# Unmatched account selling expertise

The strategy + methodology + technology your sellers need to focus on accounts with the highest probability of growth.



## Enhance and develop your relationship footprint

Identify gaps in your account relationships with people who have influence, and create actions to deepen buyer connections.



## Deeper collaboration for account plan reviews

Test and Improve to identify gaps, vulnerabilities, and recommendations with support from the broader revenue team.



## Enabling the how

Enablement services and support to instil best practices and deliver ongoing behavioral change.



*It's scary to look at longer-term horizons when you've got quotas to hit in the short term, but it's worth it. Thinking long-term didn't mean we were just waiting for a contract to land in two years. It was about creating the kinds of near-term proof points in Altify Accounts that kept people motivated and confident that they were doing the right things."*

**Sarah Walker**

Former Director, Corporate & Public Sector BT Group

**80%**

80 percent of value created by successful growth companies comes from existing customers.

Source: McKinsey & Company "Choosing to grow: the leader's blueprint"

**52%**

52 percent of organizations not using account-based strategies experiences lower average win rates.

Source: Gartner "3 Pillars of Account-Based Strategy"

**20%**

Having no account-based sales strategy decreases customer lifetime value by 20 percent.

Source: Gartner "3 Pillars of Account-Based Strategy"

### Altify Accounts

Unlock growth potential

### Altify Insights

Unleash the power of connections

## Complement your sales tech stack with Altify's suite of Salesforce native solutions

Connecting Altify Sales Solutions fully enables simplified selling

- Altify Accounts
- Altify Insights
- Altify Opportunities
- Altify Sales Process



### Altify Opportunities

Boost deal size and win rates

### Altify Sales Process

Accelerate sales cycles

## Used by leading sales organizations around the world



GE HealthCare

AUTODESK



Honeywell

Johnson Controls



## Ready to get things done?

Contact us to learn how Altify can help you create connection, clarity, and collaboration in every sales engagement.

Get in touch

Altify is the Account Planning AI Cloud helping sales teams grow revenue by planning smarter.

Altify was founded on a core belief: strategic B2B selling puts the customer at the center. We know sales success isn't just about selling something—it's about creating mutual value, which demands a solid plan. Our mission is to shape the next generation of sales leaders. We equip revenue teams with proven methodology, strategy, and technology to foster a customer-first mindset that strengthens relationships and wins more opportunities. Altify is not just software, but rather full-service sales transformation, powered by software. Our expert team helps sales organizations build and scale successful, tailored methodology-backed programs, with wholistic support from sales strategy and training to technical implementation. We ensure long-term customer value, proudly helping the world's best sales teams deliver unparalleled results. See how Altify can transform your revenue operations at [altify.com](https://altify.com)