

The twenty-minute account review.

Full account planning takes half a day, so most accounts never get one. This version runs on a whiteboard with a rep and a manager. Three accounts fit in an hour. From *No Excuses! A Better Way to Sell*, chapter 10.

01
HOW IT RUNS

0-8	The situation. The rep talks, the manager writes. Everything true about this account today.
8-11	Mark it. Go back and mark each line good or bad for you. Argue here.
11-15	What to sell. Name the product, the dollars, and the month.
15-20	What happens next. Turn the marked lines into work, with a name and a date on each.

02
WHAT YOU WRITE

THE SITUATION	WHAT TO SELL	WHAT HAPPENS NEXT
Facts, one per line. A new plant manager. A competitor's equipment. A frozen budget. A trial that went well.	The product or service, the dollars, the month. No number and no month means it is not an objective yet.	Who does what, and by when. The good lines earn work too, not only the bad ones.

03
WHERE IT GOES WRONG

NO BAD NEWS	The rep is selling the manager. Ask what could cost you this account, then write the answers on the board.
NO NUMBERS	An objective with no dollars and no month cannot be checked next quarter, so it will not be.
NO NAMES	Work that belongs to everyone belongs to nobody. It comes back next quarter in the same words.

MARK EVERY LINE. THAT PASS IS WHERE THE REVIEW HAPPENS.

3 PARTS · 20 MINUTES · 3 ACCOUNTS IN AN HOUR

360 account snapshot.

ACCOUNT

DATE

IN THE ROOM

01 • THE SITUATION

MARK EACH LINE + OR -

+

-

+

-

02 • WHAT WE WANT TO SELL

DOLLARS AND A MONTH

PRODUCT OR SERVICE

HOW MUCH

WHICH MONTH

03 • WHAT HAPPENS NEXT

ONE LINE PER MARKED ITEM

WHAT

WHO

BY WHEN

