ESSENTIAL GUIDE

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# Essential Guide to Relationship Mapping

salesforce PARTNER

# Relationships Matter

Growing companies focus on strengthening relationships within their key accounts because they understand that without secure connections, there are no transactions – in fact, Gartner recently reported the average buying group size for a complex B2B solution involves six to ten decision makers. Potential clients will ignore your solution if there is a weak relationship because it's easier to say no to someone with whom you don't have rapport.

Despite focusing on relationships, many teams continue to be challenged by issues that obstruct sales velocity and performance. These issues are amplified when selling into remote, distributed teams. Important activities such as charting influence, mapping stakeholder hierarchies, establishing social connections, and identifying champions or blockers in different business units have traditionally been handled outside the Salesforce platform where information is quickly dated and accountability is often lost.

Modern relationship maps are one of the best tools to bring your Salesforce contacts to life and boost productivity within sales and customer success teams. While relationship mapping is not a new concept for B2B companies, the technology continues to advance and improve as time goes on. What was once done in static spreadsheets and org charts can now be accomplished in real-time with visibility across all business units.

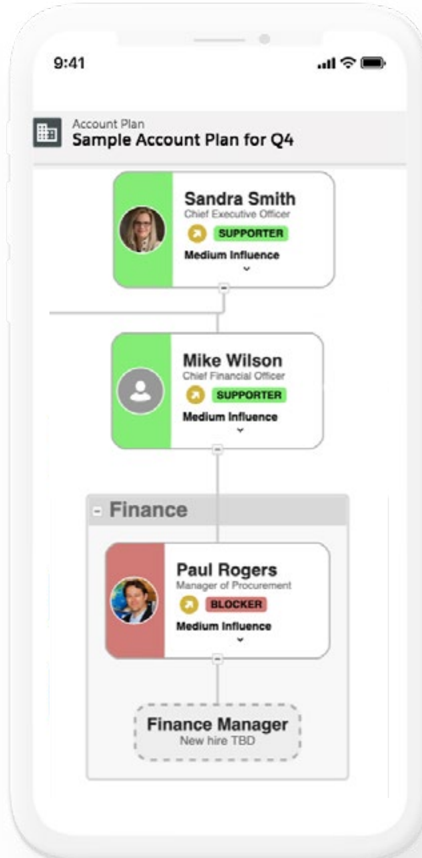
This *Essential Guide to Relationship Mapping* is your resource to increasing pipeline visibility and performance, through both existing and potential customers across the ever-evolving sales landscape.

## What is a Relationship Map?

A relationship map, also known as a hierarchy or org chart, creates a way to visualize connections within a target company to see how sales opportunities can be won. Relationship mapping shows interactions of individuals and teams in your key accounts to help identify decision-making patterns and influence. It is also useful when blueprinting and improving relationships with your existing customers, resulting in better renewal and upsell opportunities.

**In other words, it brings a static org chart to life by highlighting dynamic relationships and identifying decision makers.**

Understanding the cohesion of the organizations you work with helps increase win rates, new account acquisition and existing account penetration, which were also the top three company goals in our State of Sales Enablement 2020 research report. As companies restructure or more buyers become involved in an opportunity, keeping track of your champions and ensuring buy-in from new team members and decision-makers is crucial.




## Setting a Strategy

Before you start building a relationship map, you should identify what you are trying to accomplish. For example, will this help guide your account plan strategy or simply help you organize a company's structure?

Your account strategy not only defines your focus, it also helps uncover the unknown. You'll want to outline business development initiatives and actions planned around accounts or segments, including goals, expectations, and pain points. By outlining any gaps, you can create a shared account strategy that begins with the customer's goals and ends with how you can help achieve them — all while ensuring that your strategy is viable.

## Select Accounts and Identify Stakeholders

Account selection is an important step because you'll want to identify influencers and decision makers to reach out directly with highly relevant, personalized calls and content.

You may already have an idea about the kinds of companies that are most likely to generate the results you need to be successful. Here are a few questions to guide your account selection:

- Where have we been effective in the past?
- Which account types have been profitable?
- What are the most predictive characteristics of sales success?
- What account types should be ruled out?
- In which accounts do we already have an advantage?
- In which accounts are we already engaged and have relationships?
- What accounts deliver the most strategic value?

Your current customers can also provide much needed insight into which accounts to target for up-sell and cross-sell opportunities, or to target similar accounts.

Begin by compiling everything you know about an account, including both factual and strategic information. To get started, companies often analyze the following:

- Existing business - What are their industries and how are they structured?
- Customer satisfaction - Have they been successful with your solution?
- Financial performance - Have they performed better because of your solution?
- How you help your customers - What ROI have you helped deliver?
- The products and services you have implemented - Which specific products and services have delivered the most success? What additional offerings could improve their performance?
- Plans moving forward - What are their objectives and how can you help drive efficiencies and growth?

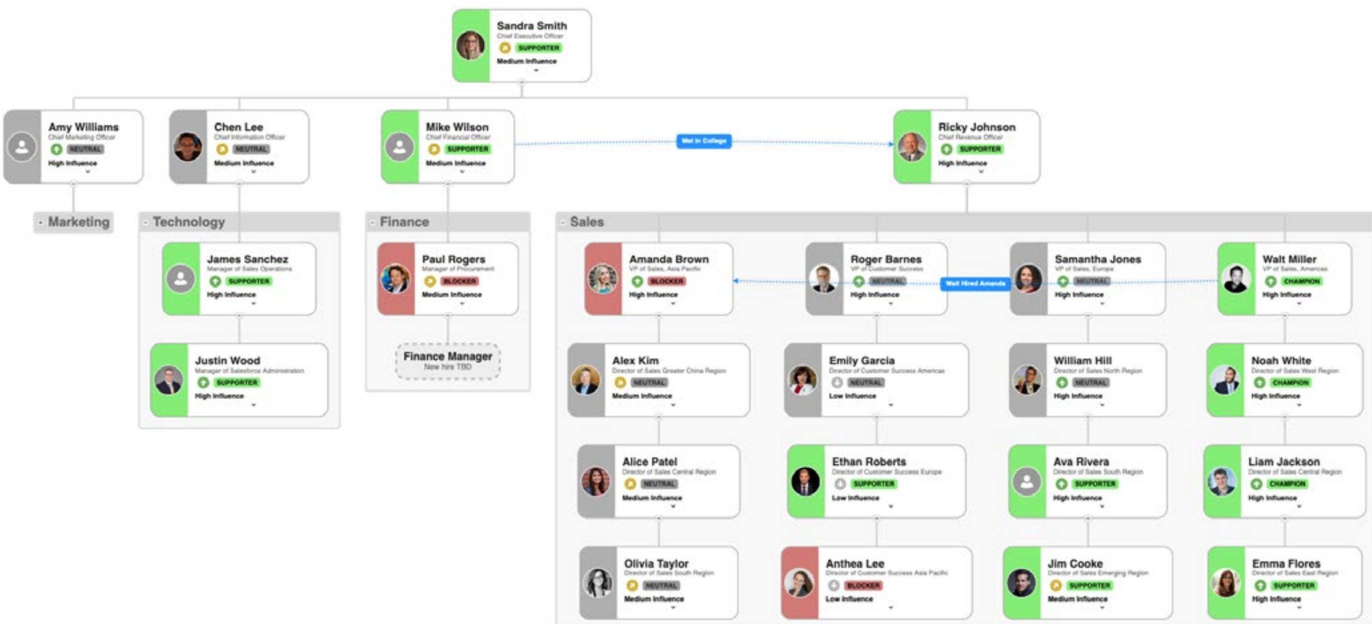
## Create Your Relationship Map

From here, work to define the action plans to develop your existing relationships. Map out your current relationship network, including the type and quality of relationships, and how each person serves within a buyer role. This will help identify any relationship gaps and align your goals around your customer's goals.

Start with building a visual chart of the key stakeholders and contacts you have within the account. You'll want to identify if any champions or blockers of your brand, especially to expand into current accounts. For example, if you have a blocker in one business unit but have a champion in another, the champion can help you turn that blocker into a supporter.

Another important aspect to a relationship map is connections between your contacts, whether personal or business-related. While you might not have a direct line to the top decision-maker through the organization's hierarchy, many colleagues connect outside the office or are co-members of social network or alumni groups, etc. Key relationships can help you get in contact with the right person you need to move a deal forward.

Many companies also create a template for their relationship mapping, such as identifying the CRO and Sales Managers in your territory before opening an opportunity. This can help streamline key account identification and focus your team on accounts that will be fruitful.




## Next Steps

Once you establish goals, create your map and gain buy-in, outline the actions needed to open opportunities and communicate progress. Break down overarching and hierarchical account strategies in terms of tactics, tasks, and action items. This not only keeps your team aligned — it helps avoid any confusion and keeps track of the execution of your plan. And continually assess risks and threats to keep your team on track.

## Relationship Mapping Tools

Don't spend hours manually creating a relationship map that will be time-consuming to manage. The most modern native Salesforce apps automate the process by providing a canvas on which you can map distinct groups with varying levels of complexity. This makes it easy to visualize digestible parts of an org chart or a full company map to view key stakeholders. Here's a brief checklist of requirements to consider when selecting your tool:

- **Dynamic Relationships** - It should be easy to drag and drop Salesforce contacts onto a map, and draw and annotate relationships between them.
- **Influence Chart** - The best relationship maps are bundled with a visual influence map to help quickly build account plans and identify whether contacts have high, medium or low influence and whether they are blockers, supports or champions.
- **Reporting Level** - Your relationship map should be flexible to allow for multiple layers and account complexities.
- **Native Salesforce** - You'll want to snap in your relationship map app without costly integration and training, and you should be able to drag and drop existing contacts onto the map where changes are natively updated in the CRM.
- **Salesforce Quip** - If you're also a Quip customer, be sure your relationship map works inside both platforms and automatically syncs bi-directionally.

The best relationship mapping apps are highly intuitive and enable sales to quickly untangle complicated internal relationships, helping sales and customer success eliminate admin work from their daily tasks so they can stay focused on selling.

## Native Salesforce Relationship Maps

If your company uses Salesforce CRM, the best decision is to choose a relationship mapping app that plugs directly into Salesforce. Better still, choose a native Salesforce app from the AppExchange so the interface is seamless, your data remains protected, and you can leverage your existing Contact and Account information.

Administrators can "snap in" a native app while sales reps keep selling. No integration or APIs needed. Better yet, native apps provide exclusive, real-time insights and ensure the Salesforce platform remains the single source of truth.

Because your sales team is already working in Salesforce on a regular basis, or should be, implementing a native relationship mapping app can also boost overall CRM adoption and reduce administration and training time significantly.

### Influence Chart

| | Blocker | Neutral | Supporter | Champion |
|---|---|---|---|---|
| LOW INFLUENCE | Anthea Lee Director of Customer Success Asia Pacific | Ben Cohen Event Marketing<br>Emily Garcia Director of Customer Success Americas | Ethan Roberts Director of Customer Success Europe | |
| MEDIUM INFLUENCE | Paul Rogers Manager of Procurement<br>Tiffany Hall Director of Digital Marketing | Alex Kim Director of Sales Greater China Region<br>Alice Patel Director of Sales Central Region<br>Chen Lee Chief Information Officer<br>Olivia Taylor Director of Sales South Region | Jim Cooke Director of Sales Emerging Region<br>Mike Wilson Chief Financial Officer<br>Sandra Smith Chief Executive Officer | |
| HIGH INFLUENCE | Amanda Brown VP of Sales, Asia Pacific<br>Natasha King Manager of Content Marketing | Amy Williams Chief Marketing Officer<br>Joe Hernandez Director of Sales Programs<br>Roger Barnes VP of Customer Success<br>Samantha Jones VP of Sales, Europe<br>William Hill Director of Sales North Region | Ava Rivera Director of Sales South Region<br>Emma Flores Director of Sales East Region<br>James Sanchez Manager of Sales Operations<br>Justin Wood Manager of Salesforce Administration<br>Ricky Johnson Chief Revenue Officer | Liam Jackson Director of Sales Central Region<br>Noah White Director of Sales West Region<br>Walt Miller VP of Sales, Americas |

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## About Prolifiq

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