

LAMP Worksheets Launch Meeting



Large Account Planning Worksheet

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What internal and external difficulties do you have when managing key accounts?

List possible actions to minimize or eliminate these difficulties.



Field of Play Worksheet

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Account: _____

Potential Fields of Play:

Use the following test questions to help you choose a Field of Play:

- Does the Field of Play reflect how the account makes buying decisions?
- Is this Field of Play one where we can create significant value?
- Is this Field of Play autonomous and able to make independent decisions?
- Is this Field of Play really a priority for us?
- Is this Field of Play where we have the most/best expertise?

Chosen Field of Play:



Buy-Sell Hierarchy Worksheet

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Our View

Now

Last Year

1 Year

3 Years



Field of Play's View

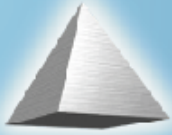
Now

Last Year

1 Year

3 Years

What are the Potential Business/Organizational Issues?



Preliminary Situation Appraisal Worksheet

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Field of Play: _____

Our most important Strategic Players in this Field of Play are:
(Name & Buy-Sell Hierarchy level)

Link Team Members in our organization to Strategic Players:

_____	Sponsors	_____
_____	Strategic Coaches	_____
_____	Anti-Sponsors	_____
_____	Additional Key Players	_____

Field of Play's most significant Trends are:

Field of Play's best Opportunities are:

Our greatest Strengths are:

Our greatest Vulnerability:



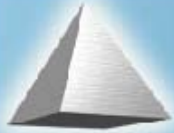
Our View of Field of Play Worksheet

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Assess how you view yourself in the Field of Play. Score each item from 1 to 10 by translating the verbal descriptions into numbers. Add up the individual scores and enter the "total score" at the lower right.

Field of Play _____

	1	2	3	4	5	6	7	8	9	10	
Level of Relationship	None		We meet their specs		We deliver good products/services		We contribute to business and organizational issues				
Our understanding of their business situation	Little or none		We are informed only of public information		We regularly read trade press; informed		We are well-informed; they share concerns with us				
Fit of our products/services to their needs	Fits somewhat		A satisfactory fit		An excellent supplier		Viewed as critical to future plans; a partner				
Positioning in their organization	We have only one contact point		We have several contact points		Positioned with key decision makers		All bases well covered; have relationships at C level				
We enjoy working with them	A big headache		They're OK		We like them		Working with them is easy and a pleasure				
Recent/past trend of purchasing from us	Declining		Flat/erratic		Increasing		Significantly increasing				
Degree to which Field of Play works with us	Creates problems		Not at all		Somewhat helpful on occasion		Often go out of their way to support us				
										Total	



Field of Play's View Worksheet

The Field of Play's View of Us and Our Competition

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If an independent researcher asked the Field of Play how they viewed us etc. how would they answer? Put yourself in their shoes and answer the questions from their perspective. Score each item from 1 to 10 using each set of verbal descriptions as a guide to the numbers. Add up the individual scores and enter the "total score" on the lower right.

Contact at Field of Play _____ Competition _____

	1	2	3	4	5	6	7	8	9	10	us	Our Competition
Level of relationship	None		Meet our specs		Deliver good products/services		Contribute to business and organizational issues					
Their understanding of our business situation	Little or none		Informed only of public information		Regularly read trade press; informed		Well-informed; they share concerns with us					
Fit of their products/services to our needs	Marginal		A satisfactory fit		An excellent supplier		Viewed as critical to future plans; a partner					
Positioning in our organization	Only one contact point		Several contact points		Positioned with key decision makers		All bases well covered; we keep them well informed					
We enjoy working with them	A big headache		They're OK		We like them		Working with them is easy and a pleasure					
Recent/past trend of purchasing from selling organization	Declining		Flat/erratic		Increasing		Significantly increasing					
Degree to which selling organization works with us	Creates problems		Not at all		Somewhat helpful on occasion		Often go out of their way to support us					
	TOTAL											

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ROLES/ RESPONSIBILITIES ACTION PLAN

Information Needed	Source	Who	By When
Identify Team Leader to assimilate gathered information for Team			
Determine method of communication			
Interview people at the customer			
Interview internal people who Support Field(s) of Play			
Gather information needed from Situation Appraisal			
Compile all Data from Team			
Give completed information to Team to review prior to LAMP session next month			

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ROLES/ RESPONSIBILITIES ACTION PLAN

Information Needed	Source	Who	By When
Gather Information and Complete Pre-Course Assignment			