



How to hit all your accounts with value, regularly

Ryan Johansen
Founder, Stress Less and Get More Done



Stress Less and Get More Done

**In the Chat : How Many Accounts Do You
Have?**

Have you heard?

You need to be more proactive.

We need to do more with less.

We need to be more scalable.



What gets in the way?

Other noisy customers

Shifting priorities

Lack of time

Not sure what to say/send

Too many accounts

Lack of process/structure

What it leads to...

Things fall through the cracks

Time flies by

Renewals get harder

You miss upselling opportunities

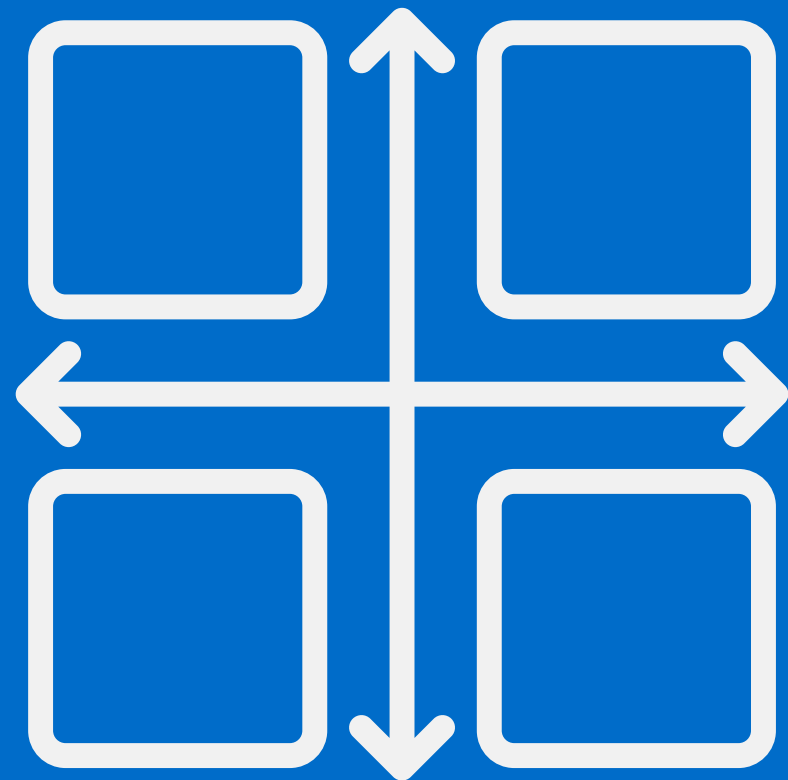
You feel like you're playing from behind

Every Parent's worst nightmare...

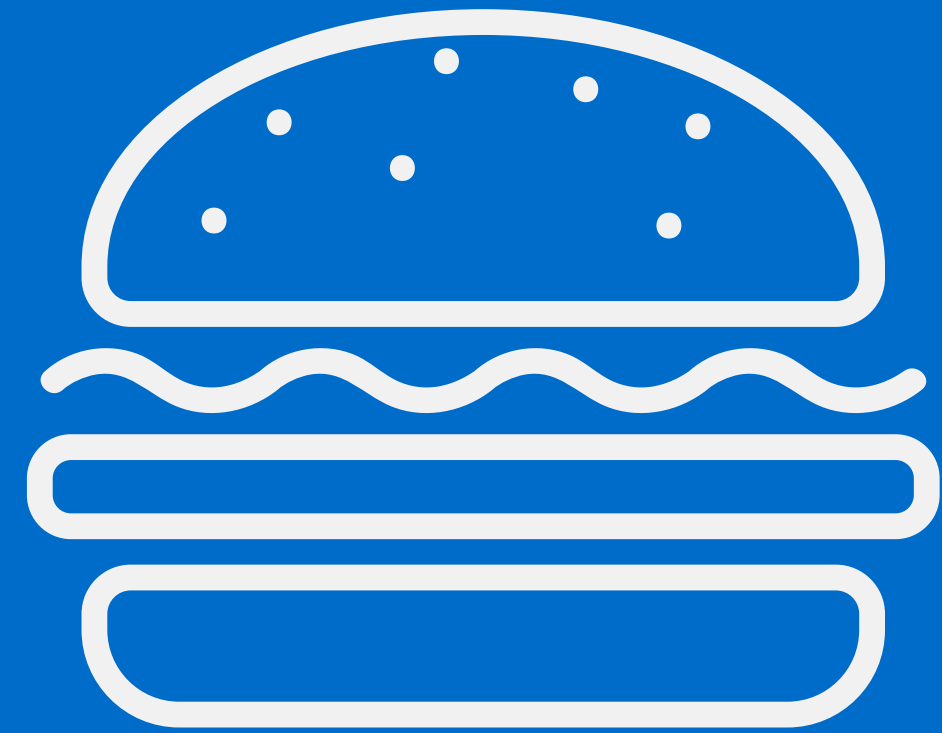


Two Techniques For Proactive value.

01 Account Outreach Matrix



02 The Value Menu



Account Outreach Matrix

How Many Accounts?

How Often do you want to reach out?

Account Outreach Matrix

Segment	Amount of Accounts	Outreach Frequency	Accounts Per Day
Enterprise	10	Weekly [5 days]	1
MidMarket	40	Monthly [20 days]	2
SMB	240	Quarterly [60 days]	4









Schedule it

Set Recurring Invites For The time period and list accounts.

Same time each day 30 minutes is ideal.

Drop Hyperlinks to a Spreadsheet or CRM with relevant contact info.

Add your Value Menu to every invite.

lay  Next 7 Days  Day  Work Week  Week  **Month**  Schedule View  

August - September 2022 Weather service is not available

Monday	Tuesday	Wednesday	Thursday	Friday
8 2:00pm Account A, Account B	9 2:00pm Account C, Account D	10 2:00pm Account E, Account F	11 2:00pm Account G, Account H	12 2:00pm Account I, Account J
15 2:00pm Account A, Account B	16 2:00pm Account C, Account D	17 2:00pm Account E, Account F	18 2:00pm Account G, Account H	19 2:00pm Account I, Account J
22 2:00pm Account A, Account B	23 2:00pm Account C, Account D	24 2:00pm Account E, Account F	25 2:00pm Account G, Account H	26 2:00pm Account I, Account J
29 2:00pm Account A, Account B	30 2:00pm Account C, Account D	31 2:00pm Account E, Account F	Sep 1 2:00pm Account G, Account H	2 2:00pm Account I, Account J
5 2:00pm Account A, Account B	6 2:00pm Account C, Account D	7 2:00pm Account E, Account F	8 2:00pm Account G, Account H	9 2:00pm Account I, Account J



The Value Menu

Repeatability / Scale

Removes Guesswork

Standardization







The Value Menu

List of Helpful Content / plays






Build and Manage as a Tteam

Use Relevant Tags / Ratings

Value Menu - Example



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	A	B	C	D	E	F	G
1	Link	Resource Type	Description	Benefit	Persona	Vertical	Tags
2	https://www.ryanjohansen.live/blog/MoreClarityLessBurnout	Article	“More Clarity: Less Burnout Blog Post ”	Helps people feel in control and focus on th the right things.	All	All	Productivity, Managing Stress, Career
3							
4							
5							
6							
7							
8							
9							

Best Practices

Make sure it's something they would care about

Include Events, articles, podcasts, compliments, get creative (Not just company stuff)

Keep your contact list organized and add details as you get them



Q & A Time

Next Session Same time Thursday:
Bouncing back from setbacks in CS

