

# Account Mapping

“I've learned that people will forget what you said, people will forget what you did, but people will never forget how you made them feel.”

— Maya Angelou

This Emotional Relevance relationship mapping is an ongoing “living” document. Whether you use your organization’s CRM system or simply keep an online version of this document, make sure you keep adding relevant details to it. Feel free to share this document with your colleagues who are also part of the relationship. You want to look at this relationship as a system of two way channels you are constantly listening to by getting updates on. Every person from your organization who has any contact with anyone at the client side should be updating this document and update you with any relevant piece of insight. This will help you make the right decisions for moving this relationship along as well as leverage each of these “channels” in order to resolve different matters you, yourself, might not be able to with your personal relationships.

## Account Information

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[Company]

[Street Address, City, ST ZIP Code]






**Tel** [Telephone]

**Fax** [Fax]

[Website]

replace with  
**LOGO**

## Stakeholders Mapping

Stakeholder	Position	About	Key professional & personal inputs	Relationship Meter Level	Relationship status	Area of interest
 Name Title [Email Address]	(Champion / interrupter / influencer / decision maker)	Location, background, hobbies, family, sports, social media	Personal aspirations Professional aspirations What are the benefits/risks for them from this deal.	1-5	Keep/Grow/Win	FM/DNI/Property Management
 Name Title [Email Address]	(Champion / interrupter / influencer / decision maker)	Hobbies Location important info  				
 Name Title [Email Address]						



**Influencer** - Influencers are people whose jobs or perspectives may have an impact on the purchase decision. Software end-users, for example, are obvious influencers. So are individuals who share their perspectives about a product or service on social media. Until you have evidence that your contact plays other roles in the decision-making process, it's safe to assume that they may influence a decision. Not all influence is equal. Even if they love you, your product or service, you'll need to verify the level and scope of their influence. An influencer may become your champion, or may lead you to one.

**Champion** - Champions are influencers on steroids. Champions don't sell for you. They are your guides—your channel through the purchase process from the prospect's point of view. If your influencer provides you with information such as the product/service review process, how the decision is made, who participates in the decision and/or if they make an introduction to a decision-maker, you have a champion. While an influencer may or may not be able to influence the outcome of your efforts, a champion does have this kind of impact and is willing to work with you. What's important to a champion may be different from what's important to a decision-maker, and it's critical to be aware of the difference.

**Interrupter /Skeptic-** As you might guess from their title, Skeptics are highly suspicious — especially of anything that conflicts with their existing knowledge, experience, or opinions. Using a Challenger sale style to offer a disruptive insight and reframe the buyer's worldview is typically effective, but it'll backfire when used on a Skeptic. You can identify a Skeptic by their domineering, sometimes combative personalities. They're unafraid to speak their minds, which means you won't need to probe for objections. Winning a Skeptic's trust is crucial to winning the deal. Skeptics are less doubtful of people who are similar to them, so highlight your personal and professional commonalities. And if possible, get a recommendation or referral from someone in their circle.

**Decision maker** - Decision-makers may or may not be the sole deciders. Many decision-makers sign off only after a product or service has been vetted by their teams. Uncovering who the key team members (and influencers) are, and how to approach them, is key to moving forward. So is securing agreement on when and how to reconnect with the decision-maker as the team moves through the vetting process.

### Emotional Relevance Relationship Meter legend:

1 – **Strictly professional.** This level of relationship is the initial, cordial, business based level. The basis of your communication is only work related and you have communicated thus far either by phone (work phone), Zoom or email.

2- **Do you have their cell phone number?** Ideally getting this number from them and not just by taking it out of their email signature. A good way to get to this point is by offering them YOUR cell number: “you know what? Here, this is my cell number, save it on yours so you can call whenever you need”

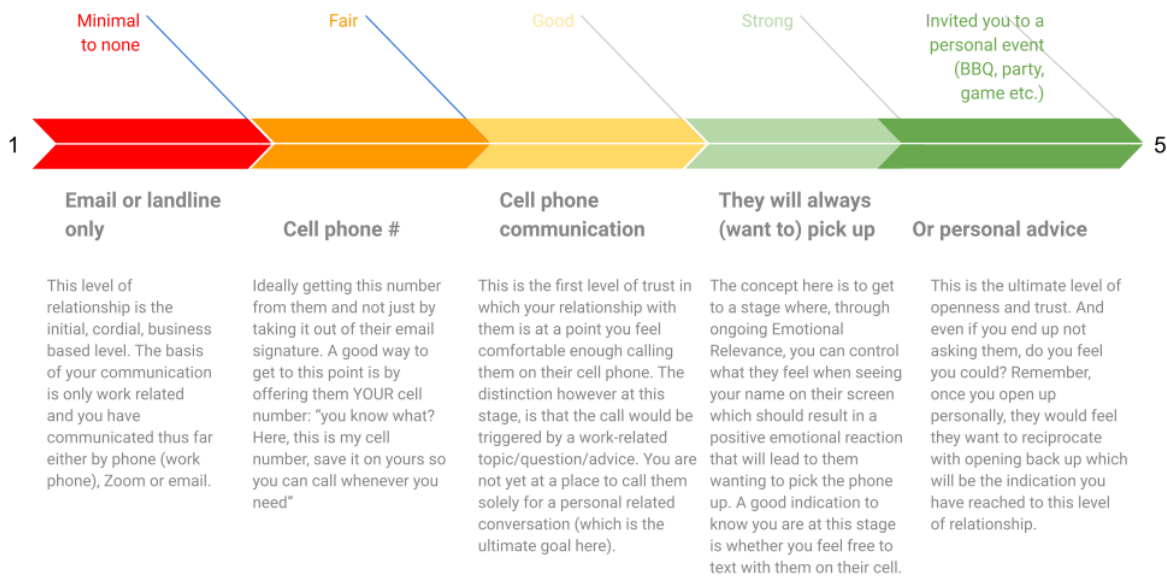
3 – **Do you feel comfortable calling them on their cell?** This is the first level of trust in which your relationship with them is at a point you feel comfortable enough calling them on their cell phone. The distinction however at this stage, is that the call would be triggered by a work-related topic/question/advice. You are not yet at a place to call them solely for a personal related conversation (which is the ultimate goal here).

4.- **If you called them and they saw your name on their screen....would they pick up?** The concept here is to get to a stage where, through ongoing Emotional Relevance, you can control what they feel when seeing your name on their screen which should result in a positive emotional reaction that will lead to them wanting to pick the phone up. A good indication to know you are at this stage is whether you feel free to text with them on their cell.

5- **Once they pick up, do you feel comfortable asking them for personal advice?** This is the ultimate level of openness and trust. And even if you end up not asking them, do you feel you could? Remember, once you open up personally, they would feel they want to reciprocate with opening back up which will be the indication you have reached to this level of relationship.

# Relationship Meter

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### Potential Customer Org Chart

