The Current State of Account Research & Planning is Costing Businesses a Fortune

POLARIS I/O
THE GO TO CUSTOMER COMPANY

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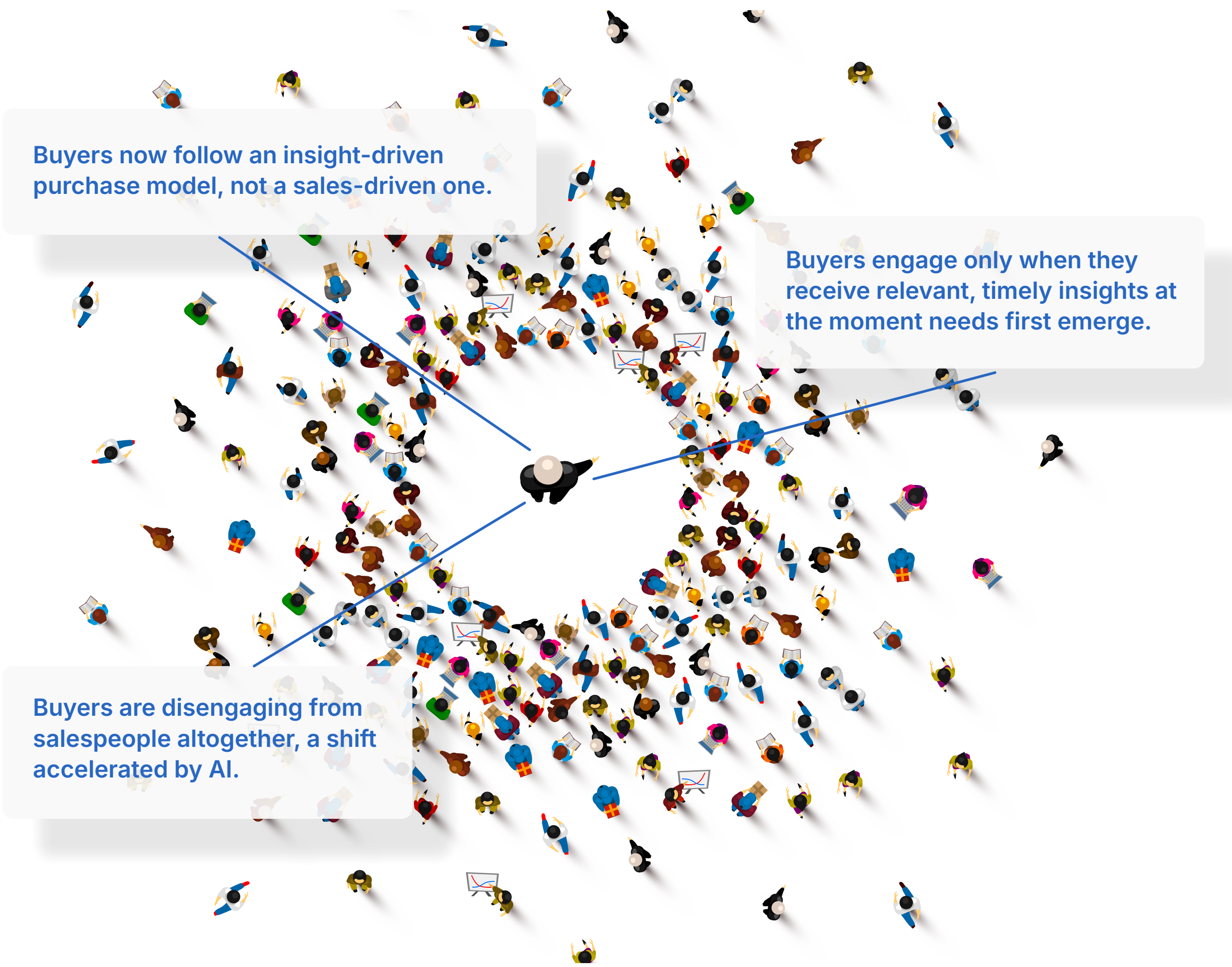
The Market is Shifting Fast, and the Pace is Only Accelerating

> **Businesses that fail to engage early in the buying cycle to address account needs risk losing deals, competitive standing, and customers.**

For CROs, CFOs, and account leaders, a major risk in today's AI-driven market is being outpaced by competitors within key accounts. When competitors gain early access, they shape growth opportunities and priorities before you can act. Too often, you're left trying to win deals after budgets are set and visions defined by others, forced into late-stage negotiations that limit influence and reduce outcomes to price.

To win, organizations need a systematic way to spot emerging customer needs, act on early signals, and engage proactively, establishing a strategic advantage long before decisions are made.

Buyer behavior has permanently changed.



The Current Cost of Account Planning and Research is High

The Cost of
Poor Account Team Efficiency

80% of account seller time is spent internally, cutting sales volume by 60%.

The Cost of
Poor Timing or Relevance

0.5% or less conversion rates and 50–75% smaller deal sizes result without early engagement and relevance.

The Cost of
Limited Account Expansion

95-98% of potential growth is left untapped.

The Cost of
Weak Planning or Prioritization

50-80% underperformance occurs in accounts when planning is ineffective.

The Cost of
Misaligned Solutions

95+% loss rates occur when solutions don't align with customer needs.

The Cost of
Competitive De-positioning

25% revenue erosion occurs each year, often leading to total account loss.

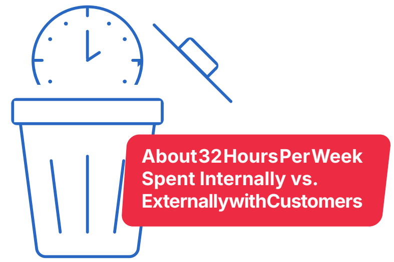
The result is compounding losses that undermine both short- and long-term revenue.

The Cost of Poor Account Team Efficiency

80% of account seller time is spent internally, cutting sales volume by 60%.

When account teams get bogged down in internal tasks, the cost is more than frustration. It wastes resources, stalls growth, and erodes both revenue and competitive advantage.

- **80% of seller time** is spent on internal tasks instead of customer engagement.
- **80% of salaries** and benefits go toward internal work.
- **60% more sales opportunities** are left untapped due to lost selling time.



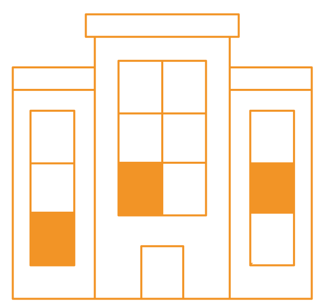
> Key Account Managers report spending the least amount of time on customer-facing activities per week compared to any other customer-facing role in the organization.
>
> Gartner

The Cost of Limited Account Expansion

95-98% of potential growth is left untapped.

Many organizations struggle to unlock the full value of their enterprise accounts. Too often, teams remain narrowly focused, limiting both visibility and impact.

- Teams stay siloed in a few divisions, low tiers, and small transactions.
- **Only 1–2%** of enterprise potential is captured, leaving major growth untapped.
- Limited expansion stalls revenue, caps deal size and margins, and erodes retention.



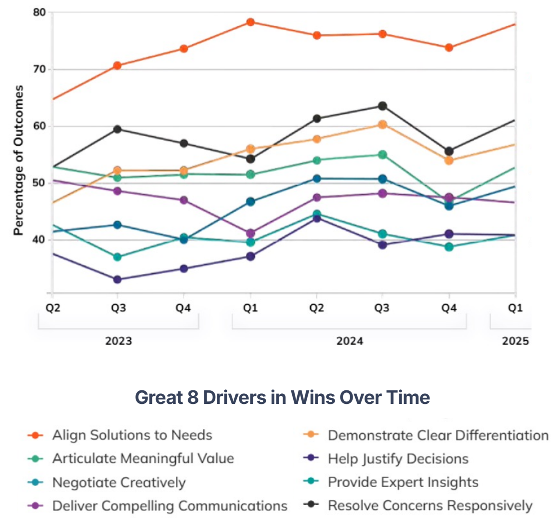
> **70% of GTM strategies** are misaligned with buyer behavior, and it's costing companies millions in lost revenue.
>
> McKinsey & Company

The Cost of Misaligned Solutions

95+% loss rates occur when solutions don't align with customer needs.

Every misfit deal shrinks revenue, slows momentum, and fuels competitors. Misalignment isn't abstract; it compounds with every missed opportunity.

- Misaligned solutions lose deals.
- Lower win rates drain revenue.
- Deals shrink when solutions don't cover buyer needs.



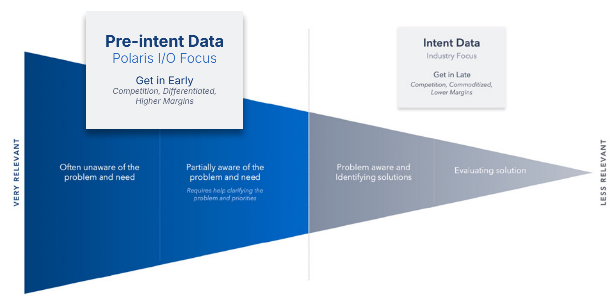
> **Only 24%** of executive buyers say sellers demonstrate a strong understanding of their business needs.
>
> Gartner

The Cost of Poor Timing and Relevance

0.5% or less conversion rates and 50–75% smaller deal sizes result without early engagement and relevance.

When messages miss the mark or arrive late, opportunities fade before they can take shape. Poor timing and weak relevance don't just reduce impact, they cost momentum.

- Late starts cause weak win rates and erode margines.
- Deal sizes shrink, and opportunities become fewer and less frequent.
- Teams lose momentum and motivation, falling further behind.



> The top-performing B2B companies now prioritize signal detection and automation over traditional CRM data management, yielding **3.8x higher revenue** per employee.
>
> McKinsey & Company

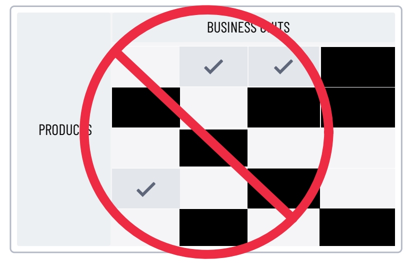
The Cost of Weak Planning and Prioritization

50-80% underperformance occurs in accounts when planning is ineffective.

Poor planning isn't obvious at first, but it compounds fast as misplaced priorities ripple across accounts, eroding performance and limiting growth.

- Manual processes, outdated data, and poor alignment doom account plans from the start.
- Account growth targets miss by **50–75%**.
- Weak accounts compound into hundreds of millions in lost portfolio growth.

Whitespace is limiting your growth opportunity



Graphic: Whitespace is designed to look for new areas to sell products by business unit, is the opposite of what executive buyers need. Executive buyers don't care about products and disengage quickly with account sellers.

> Despite key account programs being critical to driving organizational growth, **only 34%** of key account managers report hitting thie quota, according to Gartner's survey on seller productivity.
>
> Gartner

The Cost of Competitive De-positioning

25% revenue erosion occurs each year, often leading to total account loss.

Competitive de-positioning starts quietly: subtle, gradual, and costly. As competitors steer customer conversations, your influence slips, revenue shrinks, and both current and long-term account health are put at risk.

- Teams that stay irrelevant to competitors miss solution discussions and revenue.
- Existing business erodes, shrinking contracted revenue by **25%+ each year**.
- Over time, suppliers quietly lose share of wallet and eventually the entire account.

> **Only 8%** of B2B organizations have real systematic alignment with buyers.
>
> McKinsey & Company

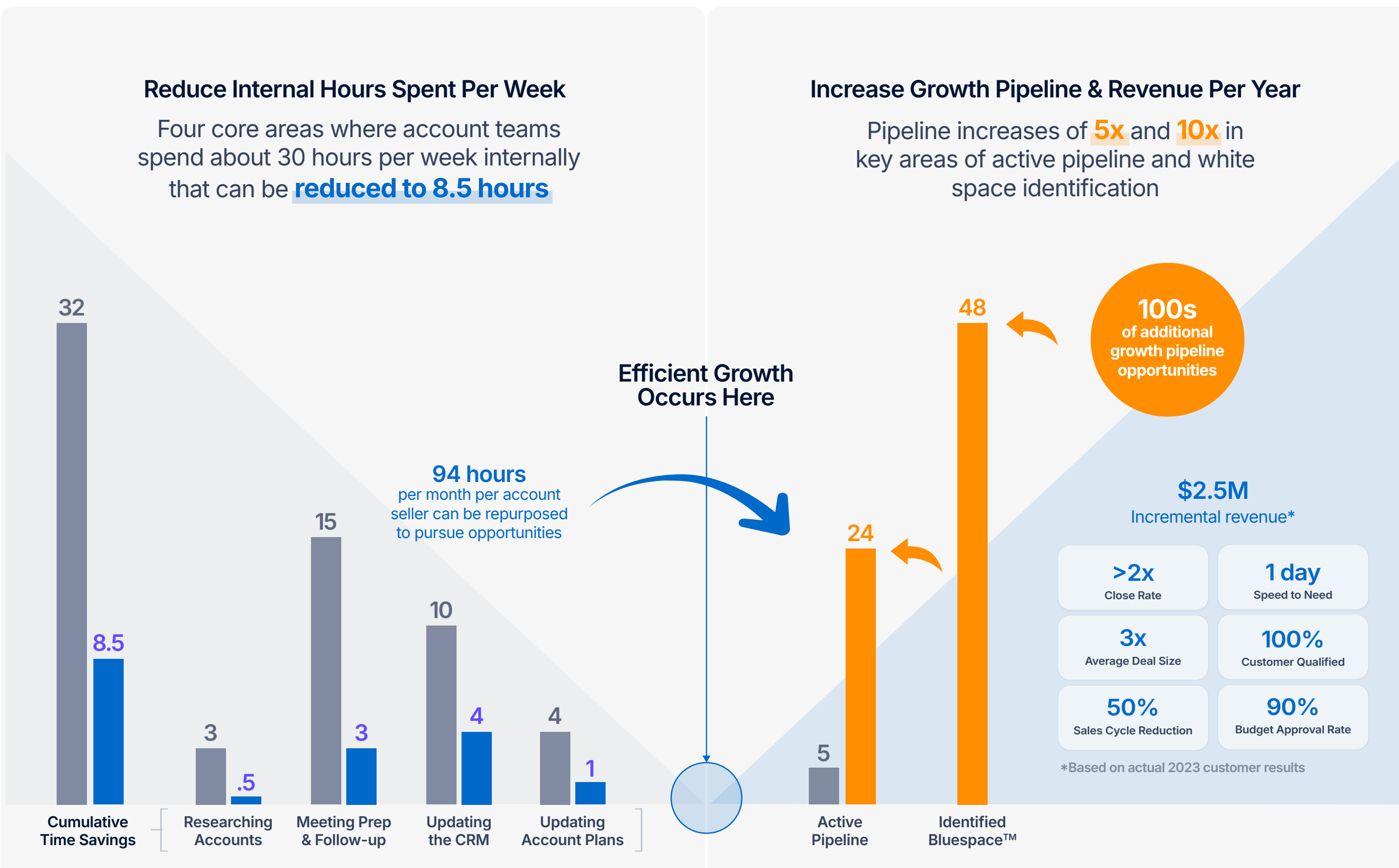
Quickly Convert Costs into Large-Scale Gains in Productivity, Pipelines, and Revenue

The Cost of	
The Cost of **Poor Account Team Efficiency** **80% of account seller time is spent internally**, cutting sales volume by 60%.	Optimized Account Team Efficiency **Shift to 80% external and 20% internal to unlock greater growth opportunities.**
The Cost of **Limited Account Expansion** **95-98% of potential growth is left untapped**.	Accelerated Account Growth **Systematically expand into new buying centers, fast.**
The Cost of **Misaligned Solutions** **95+% loss rates occur** when solutions don't align with customer needs.	Strategic Alignment **Align solutions precisely with needs, guided by in-depth contextual knowledge.**
The Cost of **Poor Timing or Relevance** **0.5% or less conversion rates and 50–75% smaller deal sizes** result without early engagement and relevance.	Timely and Highly Relevant **Leverage pre-intent signals delivered through daily alert notifications to stay relevant.**
The Cost of **Weak Planning or Prioritization** **50-80% underperformance occurs in accounts** when planning is ineffective.	Focused Planning and Clear Priorities **Automate online account planning centered on customer needs.**
The Cost of **Competitive De-positioning** **25% revenue erosion occurs each year**, often leading to total account loss.	Value Amplification **Build stronger relationships with senior executives to shut out competitors.**

Case Study: Polaris I/O Delivers Productivity Gains to Increase Pipelines and Revenue

Repurposing unproductive time gave teams more capacity to focus on customers' top priorities. By delivering actionable insights early, well before competitors, the account team became a trusted partner to customer stakeholders, valued for relevant ideas, recommendations, and solutions. The impact was clear: close rates doubled, average deal size tripled, and sales cycles were cut in half.

Achieve optimal efficient growth yield



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