

Sales Staff

Manager

Date

Client

Annual Revenue

Has an account with us?

Description of Business

Competitors

Current solution we would replace:

In-house 3rd Party Provider None *Explanation:*

Organization Objectives and Priorities

Internal and External Challenges

How a buying decision is made:

Decision-Makers and Influencers

Approval Process

Account Opportunity: Timeline

Budget

Problems they have that we solve

Current opportunity to gain deeper penetration into account or displace competitor

Our products and services they could benefit from

Competitive Positioning

Scope of Opportunity

Likelihood of success:

Strategic Objectives: How, specifically could you grow this account over the next...

...12 months?

... 2-3 years?

Account Action Plan:

What is your plan for accomplishing account objectives?

What specific steps will you take to accomplish account objectives?

How will you monitor and measure your execution of your plan?