

Key Account Planning Template: _____

1. Current Status

1.1 Account Team

Name	Title	Role

1.2 Customer Contacts / Relationships

Name	Title	Role in relationship	Level of relationship*	Level of Importance**
		Primary contact		
		Buyer		
		Specifier		
		Influencer		
Status of intercompany relationship				***

* Relationship: 0=None; 1=Poor; 2=Significant; 3=Reasonable; 4=Good; 5=Excellent

** Importance: 0=None; 1=Little; 2=Significant; 3=Reasonable; 4=High; 5=Crucial

*** Basic; Cooperative; Interdependent; Integrated

1.3 Sales History

Sales by product	Three Year Ago				Two Years Ago				Last Year			
	Sales	Inc/ Dec*	Gross M		Sales	Inc/ Dec*	Gross M		Sales	Inc/ Dec*	Gross M	
	£m	%	£m	%	%	£m	£m	%	%	£m	£m	%
Total												
Size of account**												
Share of account (%)												
Definition of account	What products / services are included within the accounts size ?											

* Increase / decrease relative to previous year

** How much money does customer spend in this area i.e. on the company's products and services

1.4 Customer Supplier Management Strategy:

Description of how customer manages supplier relationships. Does it establish strategic supplier relationships?

1.5 Describe evolution of relationship with account and how this has impacted on sales performance detailed within 1.3:

1.6 Recent Sales Performance: (month)

Sales by product	Last Year to Date				This Year to Date			
	Sales	Inc/Dec	Gross M		Sales	Inc/Dec	Gross M	
	£m	%	£m	%	£m	%	£m	%
Total								

2. Customer Profile

2.1 Market Position:

Describe customer's business – what do they do? Where do they do it?

2.2 Opportunities and threats facing customer:

What are the key external issues facing the customer – what might help them to grow / result in them shrinking?

2.3 Competitive position:

How does the customer compete and how does this compare with their competition?

2.4 Customer Objectives:

What is the customer seeking to achieve? What are its specific objectives (quantified and time bound where possible to obtain)

2.5 Customer Strategies:

What strategies does the customer aim to pursue to achieve its objectives?

3. Key Account Objectives and Strategies

3.1 Critical Success Factors*

Critical success factors	Importance weighting	Company rating**	Company Score	Best competitor rating**	Best competitor score
Total	100				

* As determined by the customer if possible

** 1=fail to meet need; 2=meet need inconsistently; 3=fully meet need

3.2 Opportunities and Threats with this Account:

Describe key opportunities and threats

3.5 Account Development Objectives: Other

Objective	Measure	Last Year	This Year	Next Year	2 Years Out

3.6 Business Strategies and Anticipated Contributions

Strategy	Contribution							
	Next Year				Two Years Out			
	Sales	GM	Resource	Net cont.	Sales	GM	Resource	Net cont.

3.6 Relationship Strategies

Name and Role	Relationship Development Strategy

Targeted relationship levels

Company Staff	Customer Staff					
	Name 1	Name 2	Name 3	Name 4	Name 5	Name 6
Name A	2 -> 4					
Name B		1 -> 3	1 -> 2			
Name C	4 -> 5					
Name D						

* Relationship: 0=None; 1=Poor; 2=Significant; 3=Reasonable; 4=Good; 5=Excellent

3.7 Risks (External) and Dependencies (Internal)

Strategy	Risk / Dependency	Chance of Occurrence	Nature of Impact	Potential difference from objectives	
				Next Year	Two Years Out

4. Action Plan

Action	Owner	Other contributors	Resource demand	Measure	Target	Due Date	Complete Date
Strategic Theme One							
Strategic Theme Two							