

Strategic account plan template

Account:		Date:		Client rep (opportunity owner):		Sales Team members:	
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Account overview and history of the relations hip	<ul style="list-style-type: none"> • <i>What do they sell? Who are their clients? What size are they?</i> • <i>What projects have we done for this client? Completed & Current</i> • <i>How long is the relationship?</i> • <i>Where are our main relationships?</i> • <i>Have we shown value?</i>
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Account strategy and industry drivers	<ul style="list-style-type: none"> • <i>What is THEIR strategy?</i> • <i>Where do they want to be in 5 years?</i> • <i>What “market driven problems” are they facing (economical, competition, legal?)</i>
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| | <ul style="list-style-type: none">• <i>Cost or revenue focused overall?</i> |
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Plans and Projects

	Business goal		Activity or project	Rev Incr	Cost Decr	Sta rt	En d	Validated by (customer name)
P1		BY						
P2		BY						
P3		BY						
P4		BY						
P5		BY						
P6		BY						
P7		BY						
P8		BY						
P9		BY						
P10		BY						
P11		BY						

P12		BY						
P13		BY						
P14		BY						

Opportunity List					
#	Oppty Name	Products & Services	Value	Expected close date	Sales stage
o1					
o2					
o3					

o4					
o5					
o6					
o7					
o8					
o9					
o10					
o11					
o12					
o13					
o14					
o15					

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