

**ACCOUNT PLAN**

<b>ACCOUNT:</b> Company Name			<b>OWNER:</b> Salesperson			<b>LAST UPDATED:</b> dd-Mmm-yy			
<b>ACCOUNT OVERVIEW:</b> Briefly summarise the current situation in the account									
<b>PAST 5 YEARS REVENUE HISTORY</b>					<b>LAST YEARS REVENUE HISTORY</b>				
<b>REVENUE</b>		<b>RANK</b>		<b>REASON</b>	<b>REVENUE</b>		<b>RANK</b>		<b>REASON</b>
£ Total Revenue		# Rank		What's behind the ranking?	£ Total Revenue		# Rank		What's behind the ranking?
<b>OUR IMPORTANCE TO THEM [SELECT ONE]</b>				<b>EVIDENCE</b>		<b>THEIR IMPORTANCE TO US [SELECT ONE]</b>			
<input type="checkbox"/> LEVEL 0: We are not currently a supplier to them <input type="checkbox"/> LEVEL 1: As one of many suppliers or options open to them <input type="checkbox"/> LEVEL 2: As one of a few preferred suppliers in our space <input type="checkbox"/> LEVEL 3: As their primary or exclusive supplier in our space <input type="checkbox"/> LEVEL 4: As their long-term strategic partner in our space				What is your evidence for believing that they regard us this way?		<input type="checkbox"/> LEVEL 0: As a target account we wish to penetrate <input type="checkbox"/> LEVEL 1: As one of many similar customers <input type="checkbox"/> LEVEL 2: As one of our more significant customers <input type="checkbox"/> LEVEL 3: As one of a handful of our most strategic accounts <input type="checkbox"/> LEVEL 4: As a critical must-retain strategic account			
<input type="checkbox"/> STAKEHOLDER ASSESSMENT COMPLETED [SEPARATE DOCUMENT]					Briefly summarise our access to key stakeholders				
<b>THEIR TOP 3 PRIORITIES AND INITIATIVES</b>					<b>HOW WE HELP</b>				
1: What is their (relevant to us) top priority or initiative? 2: What is their (relevant to us) second most important priority or initiative? 3: What is their (relevant to us) third most important priority or initiative?					How can we help them achieve this objective? How can we help them achieve this objective? How can we help them achieve this objective?				
<b>OUR PRESENCE</b>		<b>COMPETITIVE PRESENCE</b>			<b>OPPORTUNITIES</b>		<b>THREATS/RISKS</b>		
Briefly summarise our existing presence in the account - key departments, solutions installed, share of wallet, and so on		Briefly summarise competitive presence in the account - key departments, solutions installed, share of wallet, and so on			Briefly summarise our key opportunities to develop the account - both expanding existing presence and entering new areas		Briefly highlight any existing or potential threats/risks that could affect current and future revenue streams		
<b>WHAT ARE YOUR S-M-A-R-T OBJECTIVES FOR THIS ACCOUNT?</b>					<b>WHAT ARE YOUR KEY STRATEGIES AND TACTICS?</b>				
CURRENT YEAR: Briefly summarise your Specific, Measurable, Achievable, Realistic and Timely objectives for this account in the current sales year  3-5 YEARS: Briefly summarise your Specific, Measurable, Achievable, Realistic and Timely objectives for this account over the next 3-5 years					What key strategies and tactics do you plan to implement (and when) in order to achieve these objectives?				
<b>TOP 3 VISIBLE OPPORTUNITIES [REFER TO INDIVIDUAL OPPORTUNITY PLANS FOR DETAILS]</b>									
<b>DEPARTMENT</b>		<b>PROJECT</b>		<b>VALUE</b>	<b>CLOSE DATE</b>	<b>PHASE</b>	<b>FORECAST</b>	<b>STRATEGY</b>	
Department/Function		Project/Opportunity		£ Value	dd-Mmm-yy	UNKNOWN	PIPELINE	Briefly summarise your strategy	
Department/Function		Project/Opportunity		£ Value	dd-Mmm-yy	UNKNOWN	PIPELINE	Briefly summarise your strategy	
Department/Function		Project/Opportunity		£ Value	dd-Mmm-yy	UNKNOWN	PIPELINE	Briefly summarise your strategy	