STRATEGIC ACCOUNT BUSINESS PLAN

for

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**Submitted by:**

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Document Objective

The purpose of this plan is to document information about the account in a single document and to identify opportunities for a long-term relationship with the client that will bring in continuous sales opportunities.

Account Background

Objective

[List the objectives the account team wants to set that specifically address helping the client to achieve its business goals, objectives, mission statement, or responsiveness.]

Client Profile

[Briefly describe the client’s business and mission statement.]

Client Business Objectives and Initiatives

[List the client’s stated goals or objectives as well as the projects initiated in response to the client’s value drivers.]

Client Organization Chart

[Draw the client’s organization chart, indicating names and titles. Describe key players and their level of influence in decision-making. Include any recent and potential personnel changes.]

Client Contact List

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Title** | **Telephone Number** | **E-mail Address** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

Internal Team Organization Chart

[Draw the account team organization chart, indicating names, titles, and relationship with the client.]

Internal Sales Performance Summary

[Describe the past projects and performance with this client, including specific successes and failures.]

Current Engagements and Status

[List the current engagements with this client and the status of each engagement.]

Value Delivered to Client

[Summarize the business value that the account team has delivered to the client as a result of successful projects.]

Customer Needs

[Summarize the benefits that the customer expects from a longer-term relationship.]

Value Proposition

[Describe the account team’s value proposition—a statement of intent to deliver a measurable business result that the client views as a critical prerequisite or outcome for the client’s success.]

Sales Opportunities

[Identify the opportunities that the account team will pursue with this client.]

Sales Strategies

[Describe the account team’s strategy, objective, and tactics for pursuing the indicated sales opportunities.]

Financial Forecast

[Create a high-level forecast as determined by the selection of opportunities within this plan.]

Communication Plan

[Describe the plan for communicating with management for purposes of review and your plan for communicating with the client.]

Action Plan

[List the major action items that the account team will take on.]

|  |  |  |
| --- | --- | --- |
| **Action** | **Person Responsible** | **Time Frame** |
|  |  |  |

Required Resources

[Create a list of projected resources needed to successfully carry out this client plan.]