STRATEGIC ACCOUNT PLAN
for [CLIENT NAME]

CLIENT LOGO HERE

[CORPORATE ADDRESS]

Submitted by:

[Account Manager]

[Sales Team]

[Date]

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Document Objective

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

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

[Attach 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.]

Gaps/Sales Opportunities

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

Gaps	Estimated Value	Timeline
1)		
Why is the client Committed to closing Gap 1?		
2)		
Why is the client Committed to closing Gap 2?		
3)		
Why is the client Committed to closing Gap 3?		

Sales Strategies

[Describe the account team's strategy, objective, and tactics including any Bridgeheads to be used for pursuing the indicated sales opportunities.]

Financial Forecast

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

Project	Estimated Value	Gross Margin

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, money, materials, staff & assets needed to successfully carry out this client plan.]

Resources Gap 1
Client
Us
Resources Gap 2
Client
Us
Resources Gap 3
Client
Us

Customer Buying Process

[Summarize the who, what, why, where & when of customers buying process.]

Red Flags

[Red flags are blockers that will prevent you from selling. List every Red Flag and assign an action against each one which will negate the blocker]

Key People

Project Sponsor	Job Title	Telephone Number	E-mail Address
Project Lead	**Job Title**	**Telephone Number**	**E-mail Address**
Technical Lead	**Job Title**	**Telephone Number**	**E-mail Address**
Financial Lead	**Job Title**	**Telephone Number**	**E-mail Address**
Operations Lead	**Job Title**	**Telephone Number**	**E-mail Address**
User Lead	**Job Title**	**Telephone Number**	**E-mail Address**

Additional Contacts/Influencers

Name	Job Title	Telephone Number	E-mail Address

Internal Team Organization Chart

[Attach 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. Does the customer recognise this and agree with this?]