| **Account Name:** {{AccountName}} |
| --- |

| **Account Team** | | | |
| --- | --- | --- | --- |
| **KAM Name:** | {{KAMName}} | **TL Name:** | {{TLName}} |
| **SAM Name:** | {{SAMName}} | **SAM TL:** | {{SAMTLName}} |
| RM Name: (Voice) | {{VoiceRMName}} | **RMTL Name:** | {{VoiceRMTLName}} |
| **CBH:** | {{CBHName}} | **CE Head:** | {{CEHeadName}} |

**Section 1 – Account Intelligence**

**1.1** **Customer overview**

| **Products/Services** | {{Product}} | |
| --- | --- | --- |
| **Markets/Customers** | {{Market}} | |
| **Key Metrics** | {{RTB\_KeyMetrics}} | |
| **Financials** | Revenue (INR Crores) | Rs. {{Revenue}} Cr |
| Net Income (INR Crores) | Rs. {{NetIncome}} Cr |
| **Client’s Top Competitors** | {{TopCompetitors}} | |
| **Key initiatives** | {{RTB\_KeyInitiatives}} | |

**1.2 Historical analysis**



| **Product/Solution** | **Product category** | **{{prev2Year}}** | | **{{prev1Year}}** | | **{{currentYear}}** | |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Total Spend** | **Spends with Airtel** | **Total Spend** | **Spends with Airtel** | **Total Spend** | **Spends with Airtel** |
| {{#HistBUC}}{{productSoln}} | {{productCategory}} | {{Prev2YrTotalSpend}} | {{Prev2YrAirtelSpend}} | {{Prev1YrTotalSpend}} | {{Prev1YrAirtelSpend}} | {{currentYrTotalSpend}} | {{currentYrAirtelSpend}}{{/HistBUC}} |
| **Total Data** |  | **{{prev2YrTotalTotalSpend}}** | **{{prev2YrTotalAirtelSpend}}** | **{{prev1YrTotalTotalSpend}}** | **{{prev1YrTotalAirtelSpend}}** | **{{currentYrTotalTotalSpend}}** | **{{currentYrTotalAirtelSpend}}** |

**1.3** **Total spend estimation and RMS share along with key competitor details**

| **Product/Solution** | **Product category** | **Total Spend (INR- Mn) -KAM** | **Spends with Airtel** | **RMS%** | **Key competitors and comments** |
| --- | --- | --- | --- | --- | --- |
| {{#BUC}}{{ProductSolution}} | {{ProductCategory}} | {{TotalSpends}} | {{AirtelSpends}} | {{RMS}} | {{KeyCompetitorComments}}{{/BUC}} |
| **Total Data** |  | **{{BUCTotalSpend}}** | **{{BUCTotalAirtelSpend}}** |  |  |

**Key competitor summary –**

{{RTB\_KeyCompetitorSummary}}

**Section 2 – Relationship Assessment**

**2.1** **Perception analysis**

| **Strengths** | {{Strengths}} |
| --- | --- |
| **Weaknesses and threats** | {{Weakness}} |

**2.2** **Stakeholder analysis**

| **Interaction Level** | **Designation** | **Name** | **Account Team** | **Leader-**  **ship** | **Client Relationship Scores** | | **Meeting status/** **timeline** | **Objective** | **Next steps** |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Stake** **holder Score** | **Hierarchy Level Score** |
| {{#Contact}}**{{interactionLevel}}** | {{designation}} | {{name}} | {{eventAccountTeam}} |  | {{stakeholderScore}} | {{hierarchyLevelScore}} | {{eventMeetingStatus}} | {{eventObjective}} | {{eventObjective}}{{/Contact}} |

**2.3** **Win/Loss review**

| Deal | Final status | Amount | Categorization of loss | | | | | Reason for win/loss | Timeline |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Pricing | Product Offering | Sales Team | Feas./ Timeline | Misc |
| {{#WinLoss}}{{name}} | {{finalStatus}} | {{amount}} | {{#IF\_isPricingLostReason}}{{/IF\_isPricingLostReason}}{{^IF\_isPricingLostReason}}{{/IF\_isPricingLostReason}} | {{#IF\_isProdOfferingLostReason}}{{/IF\_isProdOfferingLostReason}}{{^IF\_isProdOfferingLostReason}}{{/IF\_isProdOfferingLostReason}} | {{#IF\_isSalesTeamLostReason}}{{/IF\_isSalesTeamLostReason}}{{^IF\_isSalesTeamLostReason}}{{/IF\_isSalesTeamLostReason}} | {{#IF\_isFeasTimelineLostReason}}{{/IF\_isFeasTimelineLostReason}}{{^IF\_isFeasTimelineLostReason}}{{/IF\_isFeasTimelineLostReason}} | {{#IF\_isMiscLostReason}}{{/IF\_isMiscLostReason}}{{^IF\_isMiscLostReason}}{{/IF\_isMiscLostReason}} | {{reasonOfWinLoss}} | {{timeline}}{{/WinLoss}} |

**Section 3 – Opportunity Action Plan**

| **Opportunity** | **Description** | **Comments** | **Key stake-holders** | **Key competitors** | **Immediate steps and engagement plans** | **Key timelines** | **Sizing (in million Rs)** |
| --- | --- | --- | --- | --- | --- | --- | --- |
| {{#Opportunity}}{{name}} | {{description}} | {{comments}} | {{keyStakeholder}} | {{keyCompetitors}} | {{immediateSteps}} | {{keyTimeline}} | {{sizing}}{{/Opportunity}} |

**Section 4 – Action Plan Tasks**

| **Task Name** | **Description** | **Comments** | **Key stake-holders** | Key competitors | **Immediate steps and engagement plans** | **Key timelines** | Status | **Sizing (in million Rs)** |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| {{#Task}}{{Name}} | {{Description}} | {{Comments}} | {{KeyStakeHolder}} | {{KeyCompetitors}} | {{ImmediateStepsEngagementPlans}} | {{KeyTimelines}} | {{Status}} | {{Sizing}}{{/Task}} |