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

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

**Section 1 – Account Intelligence**

* 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**

Good to have historical spend analysis – understand trends across product categories – areas where we have improved and areas where we need to focus

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| 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}} |