**Profle title**

|  |  |
| --- | --- |
| **Account name** |  |
| **Account manager** | @ mention the account manager |
| **Account stage** | Prospecting / Negotiation / Proposal / Qualification / Closed won / Closed lost |
| **On this page** |  |

**📋 Account overview**

|  |  |
| --- | --- |
| **Account revenue** |  |
| **Industry** | e.g., Retail |
| **# of employees** |  |
| **Account's key contacts** |  |
| **Account's key competitors** |  |
| **Relationship strength** | Strong / Weak |
| **Period of plan** | e.g., Annual / Quarterly |
| **Plan last reviewed** | e.g., |
| **Overview** | * List anything to keep top of mind while reviewing this plan, such as major news, buying info, or objectives. |

## 💬 Account objectives

These questions can be asked to your point contact during a call.

|  |  |  |  |
| --- | --- | --- | --- |
| **Goals** | **Challenges** | **Tried solutions** | **Measures of success** |
| What does the client want to achieve in the next 12 months? | What challenges is the account facing? | What solutions have they tried? | How will they measure success at the end of the year? |

## ✍ Account solutions

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Solutions** | **ROI** | **Potential objections** | **Objection handling** | **Status** |
| List the potential products or services that support your client's objectives. | List the potential ROI or benefit of suggested solution for your client. | List some objections your client may come up with to your solution (e.g., too expensive). | List some follow up talking points to potential objections (e.g., social proof). | presented / reviewing / in progress / Declined |
|  |  |  |  |  |

## 🗺 Account map

An account map is a visualization of the client's company, decision makers, and structure so you can take a holistic approach to their sales strategy.

<Embed your results>

Search for your favorite diagraming app on our [Marketplace](https://marketplace.atlassian.com/search?hosting=cloud%26product=confluence) and then type / to embed the diagram.

## 🗓 Action plan

|  |  |  |  |
| --- | --- | --- | --- |
| **Objective** | **Action** | **Owner** | **Date** |
| List the objectives of the account and associated actions. | e.g., Present demo of product to internal team and CFO | @ Owner name | e.g., |
|  |  |  |
|  |  |  |
|  |  |  |  |