Strategic Account Planning Template (SAP)

Document ID: SAL-SAP-2025.01
Version: 1.0
Account Name: [Client Name] (Strategic Account)
Account Executive: [AE Name]
Date: [Date]

1. Account Overview and Status

- **Annual Revenue:** [X]
- **Industry:** [X]
- **Current Relationship Status:** [Prospecting / Client - Tier X]
- **Current Products/Modules Purchased:** [List, e.g., Core Platform, Compliance Module]
- **Strategic Goal for FY[XX]:** [e.g., Secure an additional 500K ARR in the Risk department, become the sole provider for predictive AI.]

2. Organizational Map and Key Contacts

Stakeholder Name	Title/Role	Authority (Champion/Decision Maker/Blocker)	Business Value/Pain Point
[Contact 1]	[CFO]	Economic Decision Maker	Interested in TCO reduction, CAPEX vs. OPEX.
[Contact 2]	[Head of Data Science]	Technical Buyer	Interested in MLOps reliability and model performance.
[Contact 3]	[Director of Legacy IT]	Blocker	Worried about integration complexity and vendor lock-in.

3. Current Account Health and Risk Assessment

- **Adoption Rate (If Client):** [X]% of licensed users active.

- **Risk Factors:** [e.g., Strong political ties to competitor 'Atlas AI', recent budget freeze, champion recently left the company.]
- **Mitigation Plan:** [e.g., Schedule QBR with the new replacement champion, engage the Solution Architect immediately.]

4. Expansion Plan (Next 12 Months)

Expansion Target (Dept/Workflow)	Projected Value ($)	Key Pain Point to Address	NexaCore Product to Propose
[Dept. 1]			
[Dept. 2]			

5. Required Internal Resources

- **Solution Architect (SE) Time:** [X] hours per month.
- **Executive Sponsor:** [VP of Sales / CEO]
- **Marketing Support:** [Case Study / Joint Webinar required for credibility].