



Account plan

EXECUTIVE SUMMARY

Add an executive summary. This summary should start with a succinct overview of the company and client, highlighting core challenges and opportunities. Clearly articulate primary goals, ensuring they are measurable and have specific targets. Briefly summarize the key strategies designed to achieve these objectives. Incorporate a concise analysis of the competitive landscape and emphasize your company's unique strengths. Conclude with a high-level financial projection and a compelling call to action, encouraging stakeholders to review and support the plan.

ACCOUNT OVERVIEW

Account information

Name	<div> Person</div>
Email	Email address
Phone number	(000) 000-0000
Address	<div> Place</div>
Communication preference	<div>Phone ▾</div>

Company profile

Company name

Industry

Company size

1-10 employees ▾

Annual revenue

\$0,000,000.00

Vision

What problems are they trying to solve

How are they going to solve them

What value can we add or how we can help

Past and current sales

Product	Value
Product name	\$000/month
Product name	\$000/month
Product name	\$000/month

Future opportunities

Product	Value
Product name	\$000/month
Product name	\$000/month
Product name	\$000/month

HEADWINDS / BLOCKERS

- Identify potential challenges or obstacles that may impede progress towards achieving the account objectives
- Consider internal factors within the account, such as budget constraints, decision-making processes, or existing vendor relationships
- Account for external factors, such as competitive landscape, market trends, or regulations
- For each identified headwind or blocker, outline potential mitigation strategies or contingency plans

REQUESTS

- Define requests or actions needed to advance the account strategy
- Include requests for internal resources, such as personnel, budget, or marketing
- It may also entail requests directed towards the account, such as access to key decision-makers, participation in specific events, or collaboration on joint initiatives
- Ensure that each ask is specific, measurable, achievable, relevant, and time-bound