

# KEY ACCOUNT BUSINESS PLAN

for [CLIENT NAME]

CLIENT LOGO  
HERE

[CORPORATE ADDRESS]

Submitted by:

[Account Manager]

[Sales Team]

YOUR LOGO  
HERE

[Date]

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[Company Name] Confidential

File: [Sales Team Name] Strategic Account Business Plan.doc

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## Document Objective

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The purpose of this plan is to document information about the account in a single document and to identify opportunities for a long-term relationship with the client that will bring in continuous sales opportunities.

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## Account Background

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### Executive Summary

[List the objectives the account team wants to set that specifically address helping the client to achieve its business goals, objectives, mission statement, or responsiveness.]

What is the desired relationship status and the current status?

Generic strategy based on selection matrix position (Manage for cash, pro-active maintenance, selective investment or strategic investment.

Why is the client a key account? What are the account attractiveness scores and how does the client perceive us in terms of relative business strength?

What key account analysis has been done (Market

### Client Profile

[Briefly describe the client's business and mission statement.]

### Client Business Objectives and Initiatives

[List the client's stated goals or objectives as well as the projects initiated in response to the client's value drivers.]

### Client Organization Chart

[Draw the client's organization chart, indicating names and titles. Describe key players and their level of influence in decision-making. Include any recent and potential personnel changes.]

### Client Contact List

Name	Title	Telephone Number	E-mail Address

### Internal Team Organization Chart

[Draw the account team organization chart, indicating names, titles, and relationship with the client.]

### Internal Sales Performance Summary

[Describe the past projects and performance with this client, including specific successes and failures.]

### Current Engagements and Status

[List the current engagements with this client and the status of each engagement.]

### Value Delivered to Client

[Summarize the business value that the account team has delivered to the client as a result of successful projects.]

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## Customer Needs

[Summarize the benefits that the customer expects from a longer-term relationship.]

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## Value Proposition

[Describe the account team's value proposition—a statement of intent to deliver a measurable business result that the client views as a critical prerequisite or outcome for the client's success.]

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## Sales Opportunities

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[Identify the opportunities that the account team will pursue with this client.]

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## Sales Strategies

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[Describe the account team's strategy, objective, and tactics for pursuing the indicated sales opportunities.]

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## Financial Forecast

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[Create a high-level forecast as determined by the selection of opportunities within this plan.]

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## Communication Plan

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[Describe the plan for communicating with management for purposes of review and your plan for communicating with the client.]

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## Action Plan

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[List the major action items that the account team will take on.]

Action	Person Responsible	Time Frame

## Required Resources

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[Create a list of projected resources needed to successfully carry out this client plan.]