

# STRATEGIC ACCOUNT PLAN TEMPLATE

*"By failing to prepare, you are preparing to fail."*  
-Benjamin Franklin

*"If I had eight hours to chop down a tree, I'd spend six hours sharpening my ax."*  
-Abraham Lincoln

**AVENTION**

FORMERLY OneSource

# Table of Contents

## Contents

Executive Summary .....	3
Account Information .....	4
Business & Industry Summary .....	4
Business & Industry Summary – CONT .....	6
Accounts Key Competitors .....	8
Product & Solution Alignment .....	8
Embedded Information Technology Architectures .....	9
All Current And Planned Projects .....	10
CURRENT Projects and Evaluations .....	10
FUTURE Projects and Evaluations .....	10
Sales Opportunity Pipeline And Forecast .....	10
Current Proposals on the Table .....	10
Contract Information .....	11
Relevant Success Stories And Case Studies .....	11
Relevant Industry Insights Or Initiatives .....	12
Relationships .....	12
Organizational Charts .....	13
Voice of the Customer .....	14
Strategic Relationship Assessment .....	15
Partner Analysis .....	15
Activities, Tasks and Events .....	17
Contact Avention .....	19

## Executive Summary

Account Name:	Date:
---------------	-------

The Strategic Account Plan is designed to help the account management team effectively prepare and stay focused on the customer's business objectives and goals to ensure they achieve the planned results, create a consistent experience for the customer, and ultimately identify how they can make a positive impact on the customer's business.

This is your opportunity to write a one-page short summary of the past, current, and forecasted situation in the account.

How are they currently using your products? How are they using your competitor's products? And, how is their growth going to affect usage of your product?



**Current Industry Trends**

(E.g. If the company is in the business of moving freight, how are increased fuel costs going to affect their business and their need for your product?)

**Key points from the latest earnings call?**

(E.g. executive management changes, economic conditions, merger & acquisitions, security breaches, new investments, etc.)

--

**Business & Industry Summary – CONT.**

	Current FY Ends		Month/Year		
Financial Information	FY4	FY3	FY2	FY1	Current FY
Revenue					
Net Income					
Growth Rate					

Major Subsidiaries and/or Divisions	
Subsidiary Name	
Location	
Information on Subsidiary	
Subsidiary Name	
Location	

<b>Annual Report Highlights</b> – What are the key business issues, challenges, drivers, initiatives from the annual report, news articles or other documents?

--

**Significant Developments** (past 12 months) – Major achievements or setbacks, changes in management and changes in the competition?

SALES TRIGGER EVENTS

--

## Accounts Key Competitors

Their top three competitors	#1 (Name of company)	#2 (Name of company)	#3 (Name of company)
Revenue			
Net Income			
Growth Rate			

List below your customer's top three competitors and the specific areas they compete in. What are the strengths and weaknesses of each competitor and how does your customer sell against them?

Competitor #1 (Name of Company)	
Competitor #2 (Name of Company)	
Competitor #3 (Name of Company)	

### Key Value Proposition to the Customer – Elevator Pitch

--

## Product & Solution Alignment

Line of Business – Division – Subsidiary	Product – Solution	Sales Revenue




## **Embedded Information Technology Architectures**

<b>TECHNOLOGY</b>	<b>VENDOR</b>	<b>VENDOR</b>	<b>VENDOR</b>
ERP			
CRM			
SCM			
PLM			
Email Servers			
ILM			
Info Security			
Network Operations			
Data Warehouse			
HRMS			
Manufacturing Systems			
Planning Systems			
Data Center Consolidation			
Virtualization			
Business Intelligence			
Operating Systems			
Web Servers			
Disaster Recovery			
Outsourcing			
Mainframes			
Other 1			
Other 2			
Other 3			

<b>Data Center Locations (Domestic &amp; International)</b>	
Address and Country	
Address and Country	
Address and Country	
Address and Country	

## **All Current And Planned Projects**

What projects are currently in progress or may be planned in the near term (six months) that may assist or hinder forecasted Sales Opportunities? (E.g. Six Sigma, outsourcing, ERP implementation, internal audit, etc)

### **CURRENT Projects and Evaluations**

Project Name / Vendor Partner	Decision Maker	Time Frame	Budget Approval Status

### **FUTURE Projects and Evaluations**

Project Name / Vendor Partner	Decision Maker	Time Frame	Budget Approval Status

## **Sales Opportunity Pipeline And Forecast**

### **Current Proposals on the Table**

Product, Service, Solution	Proposal Amount	Expected Revenue	% Close	Close Date
				0-30 Days
				30-60 Days
				60-90 Days

				90+ Days

### **Contract Information**

(Internal and Domestic) Policies for all affected locations around the globe – ATTACH RELEVANT DOCUMENTS

How does the customer make IT purchasing decisions?	<input type="checkbox"/> Central	<input type="checkbox"/> Regional	<input type="checkbox"/> Local
What is the company culture? (are decisions made at the divisional level or is it centralized?)			
Product Pricing			
Services & Education Pricing			
Support Pricing			
What level of support does the customer receive?			
FY__ SPEND			
FY__ SPEND			
FY__ SPEND			
What is the impact on channel partners (OEM, DISTRIBUTOR, VAR, RESELLER)			

### **Relevant Success Stories And Case Studies**

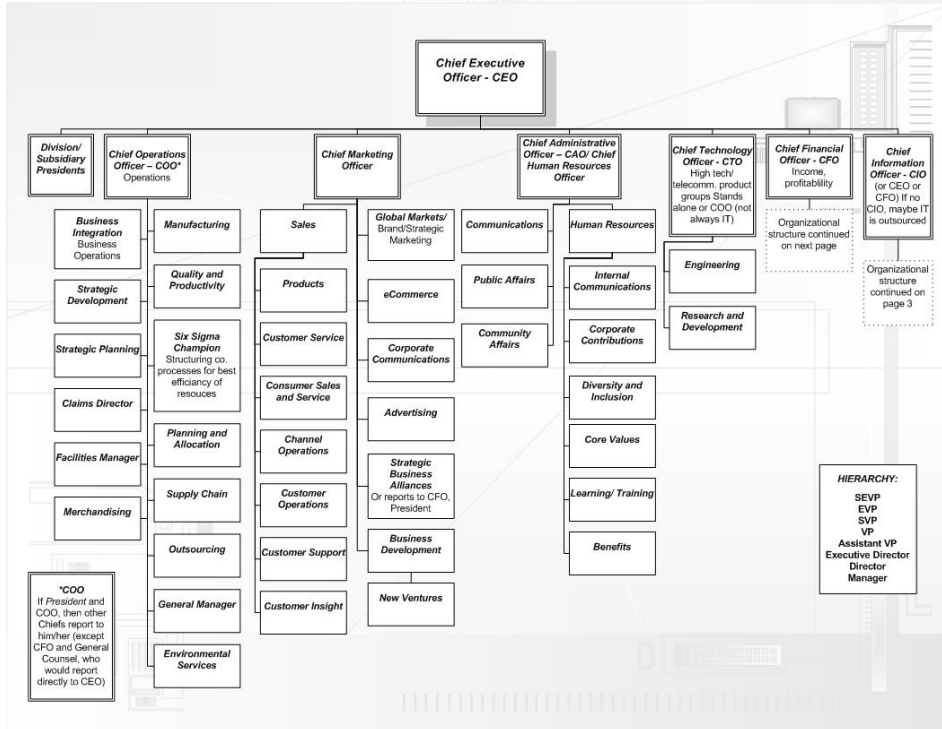
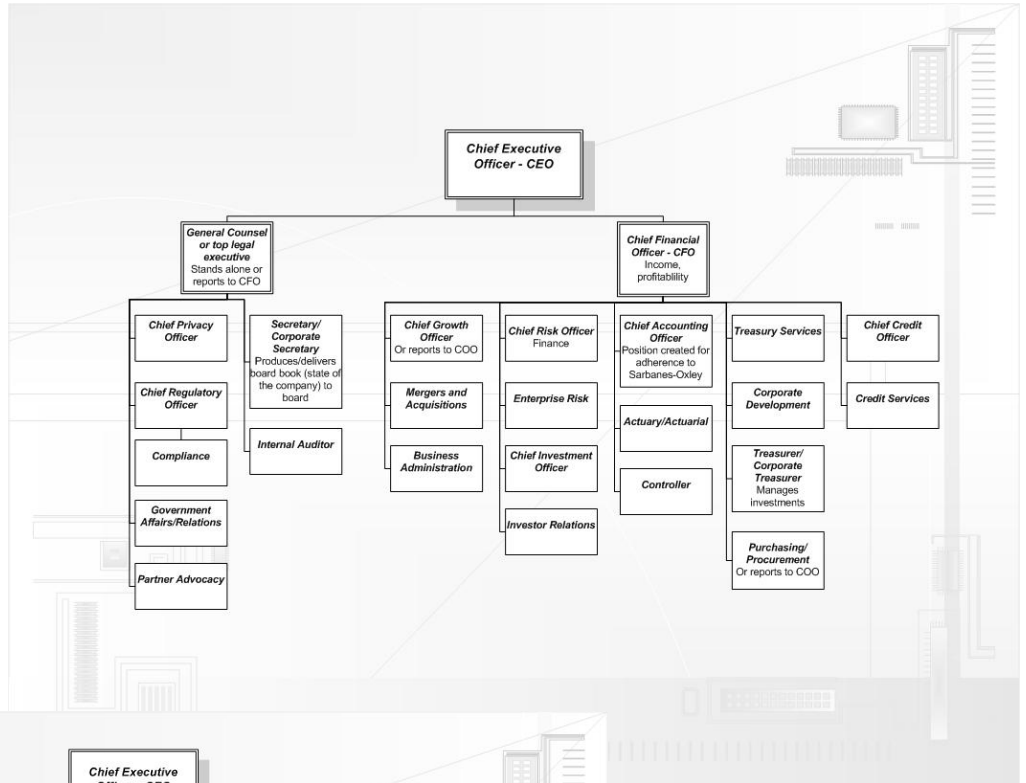
Are there any success stories or case studies that you need to know about and reference with your customer?

VENDOR NAME	AREAS OF SUCCESS/RESULTS	HOW CAN YOU USE THIS INFO?



# Organizational Charts

Attach an organizational diagram mapping the relationships of the executives including the politics of the account. Office of the CEO and his/her direct reports.  
(SAMPLE ORG CHART)



## **Voice of the Customer**

Questions to ask your customer...

How do you define a strategic relationship? And how do you compare to your partners? How do you measure a successful partnership?	
Given your three to five year goal of XYZ, what do you need to do to become a strategic partner?	
What outside influence will affect your future?	
What is the biggest challenge you're facing today?	
What is your expected market?	
Who is your primary competitor?	
What would be the most effective way for you to impact your strategic decision?	
How does your corporate culture affect the way you make decisions?	
What do you perceive are our weaknesses as a vendor?	
Why aren't we doing what you'd like us to do?	

## **Strategic Relationship Assessment**

This section will help you analyze the customer's relationships with other third parties including technology, business, financial, consulting, auditor, market research, and other significant influential parties.

Current and Potential Strategic Relationships with Partners	Why should the customer invest in building a stronger relationship with them?	Why shouldn't the customer continue to invest in building a stronger relationship with them?
Strategic Supplier A (Company name here)		
Strategic Supplier B (Company name here)		

## **Partner Analysis**

This section will help you analyze which of the above partners will be in a position to help you in the account. *This section is intended to reflect the perspectives of the partners, not your own.*

Partner	Status +/-	Areas of joint value	Why should we partner with them?	Why shouldn't we partner with them?


The section is intended to outline all of the internal goals, objectives, and action items you may want to include in a customer-facing document.

<b>GOALS:</b> What are the six month to one year goals for the account and the one year to three year goals for the account in the following areas:		
	Three months to one year	One year to three years
Relationships Goal:		
Revenue Goal:		
Customer Success Goal:		

<b>OBJECTIVES:</b> What specific objectives need to be achieved to meet the goals outlined. The objectives must be SPECIFIC, MEASUREABLE, ATTAINABLE, REALISTIC, and TIMEBOUND (SMART). (e.g. participate in customer planning sessions, customer invited to join advisory board, speaking engagements at a conference, replace other competitors or partners, etc.)	
Objective:	Completed by date:
Relationship Goal – a Partner Objective or a series of partner objectives should be included in all plans to fulfill the short- term and long-term goals of the partnership	
Objective	By:
Objective	By:
Objective	By:
REVENUE GOAL:	
Objective:	By:



Objective:	By:
Objective:	By:
CUSTOMER SUCCESS GOAL:	
Objective:	By:
Objective:	By:
Objective:	By:

### **Activities, Tasks and Events**

What are the Activities, Tasks, and Events that need to occur to meet the above Objectives? 30-, 60-, 90- day plan. Complete each Objective below with as much detail as possible.

OBJECTIVE:				
Activities, Tasks, and Events	Customer Contact	Your Responsibility	Date	Status

OBJECTIVE:				
Activities, Tasks, and Events	Customer Contact	Your Responsibility	Date	Status

OBJECTIVE:				
Activities, Tasks, and Events	Customer Contact	Your Responsibility	Date	Status

OBJECTIVE:				
Activities, Tasks, and Events	Customer Contact	Your Responsibility	Date	Status

OBJECTIVE:				
Activities, Tasks, and Events	Customer Contact	Your Responsibility	Date	Status

OBJECTIVE:				
Activities, Tasks, and Events	Customer Contact	Your Responsibility	Date	Status

OBJECTIVE:				
Activities, Tasks, and Events	Customer Contact	Your Responsibility	Date	Status

OBJECTIVE:				
Activities, Tasks, and Events	Customer Contact	Your Responsibility	Date	Status

## **Contact Avention**

Avention, Inc., formerly OneSource Information Services, provides real-time, actionable B2B data from the world's most comprehensive database to deliver 21<sup>st</sup> century business information solutions. Avention empowers sales, marketing and research professionals with the best global B2B data available and leverages that data with its cutting-edge software. Visit [www.vention.com](http://www.vention.com) and follow us on Twitter @AventionInc.