

Account Planning Template

A fuller strategic plan for a key account; bigger picture than tracking a single upsell opportunity.

Account: _____

Account Owner: _____

Plan Date: _____

Account Overview

Current spend / contract value: _____

Contract renewal date: _____

Key stakeholders and their roles: _____

Relationship Map

NAME	ROLE	INFLUENCE LEVEL	RELATIONSHIP STRENGTH	NOTES

Account Goals

What is this customer trying to achieve as a business, beyond what they buy from you?

Whitespace (Growth Opportunity)

What else could this account reasonably need that you could provide?

Risks

1. Is there a champion who might leave?
2. Any signs of dissatisfaction or declining engagement?
3. Competitive threats or budget pressure on their end?

Action Plan

ACTION	OWNER	TIMELINE

Review Cadence

How often will this plan actually get revisited, not just written once and filed away?