**SALES ACCOUNT PLAN TEMPLATE**

|  |  |
| --- | --- |
| ACCOUNT NAME |   |
| MANAGER |   |
| STAGE OF ACCOUNT | NEGOTIATING |
| OVERVIEW |  |
| ACCOUNT REVENUE | $0.00  |
| INDUSTRY |   |
| NUMBER OF STAFF |   |
| PERSON OF CONTACT (POC) |   |
| ACCOUNT'S COMPETITORS |   |
| STRENGTH OF RELATIONSHIP |   |
| PLAN PERIOD |   |
| LAST REVIEWED | MM/DD/YY |
| OVERVIEW |   |
| OBJECTIVES |  |
| ACCOUNT GOALS |   |
| CHALLENGES |   |
| LESSONS LEARNED |   |
| MEASURES OF SUCCESS |   |
| SOLUTIONS |  |
| SOLUTIONS |   |
| ROI |   |
| POTENTIAL OBJECTIONS |   |
| OBJECTION MANAGEMENT |   |
| STATUS |   |

|  |
| --- |
| ACCOUNT MAP |
|   |

*COPY AND PASTE ICONS TO USE IN THE ACCOUNT MAP, ABOVE*

NAME

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NAME

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TITLE

|  |  |
| --- | --- |
| ACTION PLAN |   |
| OBJECTIVE 1 |   |
| ACTION |   |
| OWNER |   |
| DATE | MM/DD/YY |
| STATUS |   |
| OBJECTIVE 2 |   |
| ACTION |   |
| OWNER |   |
| DATE | MM/DD/YY |
| STATUS |   |
| OBJECTIVE 3 |   |
| ACTION |   |
| OWNER |   |
| DATE | MM/DD/YY |
| STATUS |   |

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