**[A picture containing text

Description automatically generated](https://www.smartsheet.com/try-it?trp=11733&utm_source=integrated-content&utm_campaign=/content/account-planning-templates&utm_medium=Sample+Simple+Account+Plan+doc+11733&lpa=Sample+Simple+Account+Plan+doc+11733)SIMPLE ACCOUNT PLAN TEMPLATE EXAMPLE**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
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| CREATED BY | |  |  | | |  | |  | | |  | |  | | |  | |  | | |  | |  | | |  | |  |
| Krista Ahmed | | | | | | |  | |  | | |  | |  | | |  | |  | | |  | |  | |  | |  |
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| GOAL | |  |  | | |  | |  | | |  | |  | | |  | |  | | |  | |  | | |  | |  |
| Provide the goal and vision for your plan. | | | | | | | | | | | | | | | | | | | | | | | | |
| ACCOUNT PLAN TEAM | | | |  | | |  | |  | | |  | |  | | |  | |  | | |  | |  | |  | |  |
| Icon  Description automatically generatedIcon  Description automatically generatedIcon  Description automatically generatedIcon  Description automatically generatedA picture containing person, person, wall, indoor  Description automatically generatedA person smiling for the camera  Description automatically generated with low confidenceA person smiling for the camera  Description automatically generated with medium confidenceA person smiling for the camera  Description automatically generated with medium confidence  LORI GARCIA  ––––––––––––––––––––  Project Manager  BRENNAN GARDINER  ––––––––––––––––––––  Project Specialist  KRISTA AHMED  ––––––––––––––––––––  Sr. Project Manager  MATHIAS NEVIN  ––––––––––––––––––––  Design Consultant  NAME  ––––––––––––––––––––  Title  NAME  ––––––––––––––––––––  Title  NAME  ––––––––––––––––––––  Title  NAME  ––––––––––––––––––––  Title   |  | | --- | |  | | | | | | | | | | | | | | | | | | | | | | | | | | |
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| PROJECT ACCOUNT ACTION PLAN | | | | | | | | | | | | | | | | | | | | | | | | |  | |
| ACTION STEP | | RESPONSIBLE | | | DESCRIPTION | | | | | STATUS | | | | | OUTSIDE SHAREHOLDERS | | | | | NOTES / CONSTRAINTS | | | | |  | |
| Brand messaging | | Lori Garcia | | | Task description | | | | | ACCEPTED | | | | | Name | | | | |  | | | | |  | |
| Marketing | | Mathias Nevin | | | Task description | | | | | ACCEPTED | | | | | Name | | | | |  | | | | |  | |
| Value Proposition | | Krista Ahmed | | | Task description | | | | | DECLINED | | | | | Name | | | | | Long-term vision | | | | |  | |
|  | |  | | |  | | | | | DECLINED | | | | |  | | | | |  | | | | |  | |
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