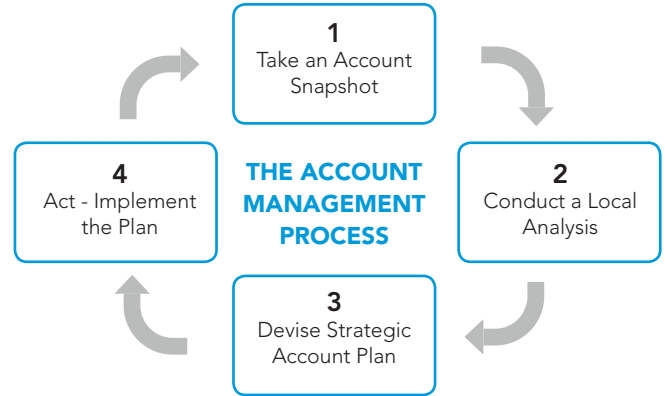


INSTRUCTIONS: Document a pro-active strategic account plan for each of your key accounts by applying the 4-step account management process. This plan will enable you to strategize, plan and execute by identifying all Fundamentals of Selling concepts to effectively grow this key account with the key decision makers.

ARTICLE: *5 Steps to Great Account Management*



Strategic Plan for: _____

1. ACCOUNT SNAPSHOT:
Key Account HQ and location:
What is their mission statement?
This year's Revenue Goal for this account is: \$
What are you selling to this account?
What else can you cross-sell or up-sell to this account?

2. CONDUCT A LOCAL ANALYSIS: Decision Makers & Influencers			
Role	Contact Name & Position	Decision Making Criteria - What's important to them?	Your Strategy/Purpose to Meet with them
The Final Authority			
Users			
Advisor			
Coach(s)			

3. DEVISE A STRATEGIC ACCOUNT PLAN: S-Specific M-Measurable A-Achievable R-Relevant T-Time Bound			
Opportunity – Apply SMART Criteria	Last Year Revenue – Actual	This Year Goal – Increase	Probability Factor

Activity to Achieve Goal & Strategy – Apply SMART Criteria	Timeline

Account ROTI

$$\text{Return On Time Invested (R. O. T. I.)} = \frac{\text{Expected Gross Profit (EGP)}}{\text{Time (T) required to capture EGP}}$$

How much time do you spend on this account weekly, monthly and throughout the year?

How could you better yield your time & revenue on this account?

Challenges / Considerations to Grow this Account

-
-
-
-

Key Questions for this Account

When you meet with this account, what are the good and great questions you will ask to better understand this account's business direction and goals to explore new opportunities?

-
-
-
-

4. ACT: Implement the plan. What will you do in the next 90 days with this account?