

Account Planning Strategy

Internal document. The purpose of this review is to document information about the account, identify weaknesses and maximise opportunities to encourage a growth in sales.



Account name:	Account Manager:
Date of review:	Revenue (previous 12 months) Sales: Profit:
Date of last review:	
Frequency of review:	Financial forecast (next 12 months):
Agency Account Manager:	Account review team:

Client profile

Briefly describe this client's business and mission statement:
List this client's stated goals or objectives:

Client organisation chart

Draw (or describe) your client's organisation chart, including names and titles. Describe the key players and their level of influence in decision-making. Include any recent or potential personnel changes.

Client contacts *(include users of your service, budget executive, accounts payable, etc)*

Client name	Position	Main contact(s) ✓	Decision maker(s) ✓	Frequency of contact	Preferred method of communication

Agency contacts

Name	Position	Main contact(s) ✓	Role/Relationship with client

Type of work the agency currently undertakes for this client

Type	Frequency	Description	Revenue

What other agencies/companies is this client using?

Agency	Role	Estimated revenue

Customer needs

Summarise the benefits that this customer expects from a long-term relationship.
What have you done recently to further this relationship?
Do you offer periodic review meetings covering budget, billing, timelines, etc?
Do you know this client's pain points?
What internal pressures are on this client which may impact their receptivity?
What is this client's satisfaction level with your work? How do you know?

How would you rank your service to this client in the following areas:

Category **1 = poor** **5 = excellent** **Comment**

Expertise of staff	1	2	3	4	5	
Proactivity of staff	1	2	3	4	5	
Quality of service delivered	1	2	3	4	5	
Output meets the brief	1	2	3	4	5	
Costs are acceptable	1	2	3	4	5	
Responsiveness and timeliness	1	2	3	4	5	
Communication	1	2	3	4	5	
Attention to detail	1	2	3	4	5	
Understanding client's business	1	2	3	4	5	
Dealing with unexpected changes	1	2	3	4	5	
Dealing with client dissatisfaction	1	2	3	4	5	
Commitment to help	1	2	3	4	5	

Value proposition

Describe the account team's value proposition:

Sales opportunities

Identify the opportunities that the account team will pursue with this client.

Sales strategies

Describe the account team's strategy, objective and tactics for pursuing the indicated sales opportunities.

Is this client aware of the full agency offering?

Type	Yes/No	Potential opportunity	Next step
Strategy			
Design – print			
Web – design			
Web – development			
Illustration			
Media			
Copywriting			

Account involvement level

Passive: we do what is needed to keep the client happy. More order-takers than sales makers.					Active: we are a valued strategic partner, pro-active and adding real value.				
1	2	3	4	5	6	7	8	9	10

Is this account in protection or growth mode?

Protection mode					Growth mode				
1	2	3	4	5	6	7	8	9	10

Is this account at risk?

Not at risk					At risk				
1	2	3	4	5	6	7	8	9	10

What are we doing to mitigate risk?

Risk reason	Risk mitigation initiatives
	<ul style="list-style-type: none">○ XXX○ XXX○ XXX○ XXX
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Action plan

Action point	Investment \$	Person responsible	Timeframe