

Account Plan Template

Account Name:		Account Manager:
Main address:	Other offices (contact details):	Customer since:
		Annual Turnover:
Telephone:	Type of business:	Products used / stocked:
Fax:		
Website:		
Overview of current relationship:	Current plans / initiatives with account:	Potential barriers to success:
Key contact / title	Commercial / personal 'hot buttons'	Attitude towards company
1.		
2.		
3.		
4.		
5.		
6.		
What is the potential with this account?		