**[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+Key+Account+Management+Action+Plan+doc+11733&lpa=Sample+Key+Account+Management+Action+Plan+doc+11733)KEY ACCOUNT MANAGEMENT ACTION PLAN   
TEMPLATE EXAMPLE**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| KEY CLIENTS | PRIORITY LEVEL | ROLE ON PROJECT | MANAGEMENT OBJECTIVES | NOTEWORTHY AREAS OF INTERESTS | COMMUNICATION PREFERENCES | RELATIONSHIPS AND STRATEGIES | CLIENT RETENTION ACTION PLANS | ADDITIONAL NOTES |
| Weller Corp. | Low | Client |  | Project Alpha | Email, text | Define the client's expectations. | Send a welcome email. | Document the client's expectations. |
| Valley View Inc. | Medium | TBD |  |  | Email | Schedule a call to answer any pre-meeting questions. | Schedule a meeting. | Document the client's questions. |
| Don D. Associates | Low | Client |  |  | Cell phone | Determine whether or not you are currently meeting the client's needs. | Schedule a meeting. | Document any positive feedback. |
|  | High |  |  |  |  |  |  |  |
|  | Low |  |  |  |  |  |  |  |
|  | Low |  |  |  |  |  |  |  |
|  | Low |  |  |  |  |  |  |  |
|  | Low |  |  |  |  |  |  |  |
|  | Low |  |  |  |  |  |  |  |

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