**[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=Sales+Account+Plan+doc+11733&lpa=Sales+Account+Plan+doc+11733)SALES ACCOUNT PLAN TEMPLATE**

|  |  |
| --- | --- |
| ACCOUNT NAME |  |
| MANAGER |  |
| STAGE OF ACCOUNT | NEGOTIATING |
| OVERVIEW |  |
| ACCOUNT REVENUE | $0.00 |
| INDUSTRY |  |
| NUMBER OF STAFF |  |
| PERSON OF CONTACT (POC) |  |
| ACCOUNT'S COMPETITORS |  |
| STRENGTH OF RELATIONSHIP |  |
| PLAN PERIOD |  |
| LAST REVIEWED | MM/DD/YY |
| OVERVIEW |  |
| OBJECTIVES |  |
| ACCOUNT GOALS |  |
| CHALLENGES |  |
| LESSONS LEARNED |  |
| MEASURES OF SUCCESS |  |
| SOLUTIONS |  |
| SOLUTIONS |  |
| ROI |  |
| POTENTIAL OBJECTIONS |  |
| OBJECTION MANAGEMENT |  |
| STATUS |  |

|  |
| --- |
| ACCOUNT MAP |
|  |

*COPY AND PASTE ICONS TO USE IN THE ACCOUNT MAP, ABOVE*

NAME

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| --- | --- |
| ACTION PLAN |  |
| OBJECTIVE 1 |  |
| ACTION |  |
| OWNER |  |
| DATE | MM/DD/YY |
| STATUS |  |
| OBJECTIVE 2 |  |
| ACTION |  |
| OWNER |  |
| DATE | MM/DD/YY |
| STATUS |  |
| OBJECTIVE 3 |  |
| ACTION |  |
| OWNER |  |
| DATE | MM/DD/YY |
| STATUS |  |

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