

Strategic Account Plan Template

Date: ___/___/___

Account Type: _____

Account Owner: _____

Client Sponsor: _____

Account Name: _____

Financials:

Plan Financial Year Account Sales Goals	\$	
Last Financial Year Account Sales	\$	
Account Sales Growth	%	

Plan Financial Year Product Sales Goals	\$	
Last Financial Year Product Sales	\$	
Product Sales Growth	%	

Account Goals		
	1 Year Goal	3 Year Goal
Revenue Goal		
Customer Success Goal		



OBJECTIVES	
What needs to be achieved to meet the goals outlined?	
REVENUE GOAL -	
Objective:	By:
Objective:	By:
Objective:	By:
CUSTOMER SUCCESS GOAL -	
Objective:	By:
Objective:	By:
Objective:	By:

State the tasks that need to be conducted to meet the objectives stated above.

OBJECTIVE -			
Task	Assigned To	Date	Status

OBJECTIVE -			
Task	Assigned To	Date	Status

