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Skaled Account Planning Template

Account planning is a great way to enhance your sales process for growing companies when an account based selling approach makes sense. Not only does it improve the efficiency of your sales team, but it also provides a strategic approach to creating and expanding value-driven relationships.

According to Gartner, a mere 28% of sales leaders report that account-management channels are effectively used to meet account growth targets.

By implementing an account plan that aligns with your growth targets, you're more likely to close complex deals and maintain relationships with those customers.

After working with hundreds of companies to scale their account opportunities and sales process, Skaled has created a simple and effective template for account planning. By allocating all of your accounts information, traction, and outbound approach into one comprehensive document, you can keep track of key touchpoints and initiatives.

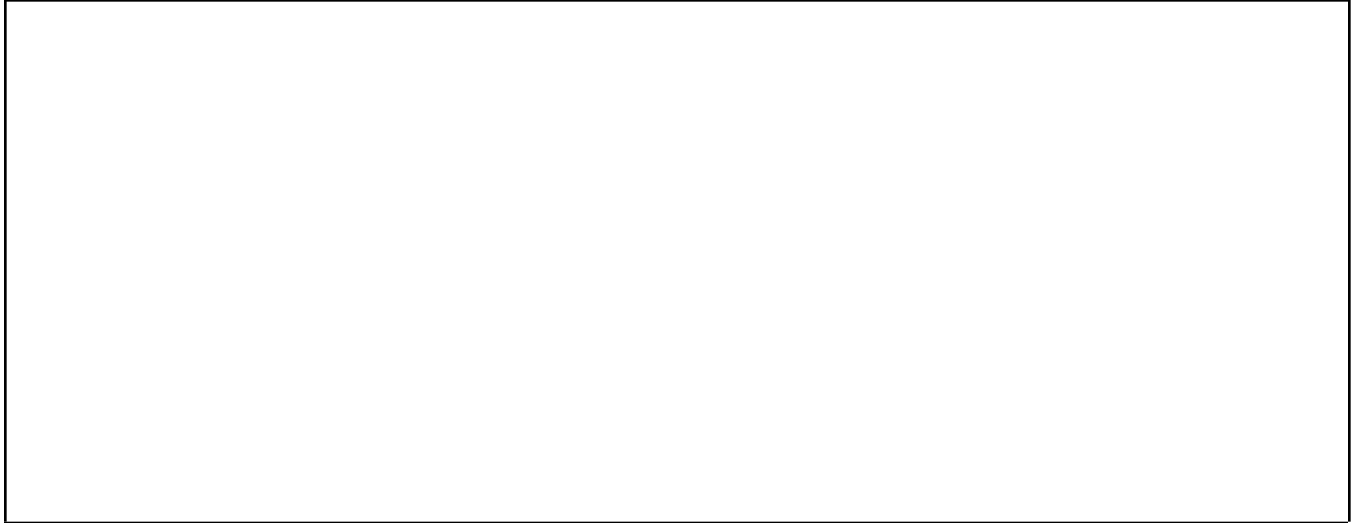
[Account Name]	
Repricer, Optimizer, Both	
# SKUs	
# of Employees	
\$ GMV	
Potential Competitors to Company in this Account	
Key Details about the Account from Research <i>Include Links (e.g. recent news, annual reports, executive changes, etc)</i> <i>Keep these relevant to value props</i>	e.g. News report states that company revenue is trending up, new products/markets,...
Similar Customers / Key Competitors to this Account that we work with	

Current Traction	
How long has this Account been a Company Customer?	
How many Contacts do we support? Any power users?	
Revenue per year w/ - Any trends in Spend?	E.g. are we trending up or down?
SKUs managed w/ - Any trends in SKU volume?	E.g. are we trending up or down?
Health of Relationships?	
White Space Analysis Upsell opportunities identified Referrals Potential Bundled Agreements	

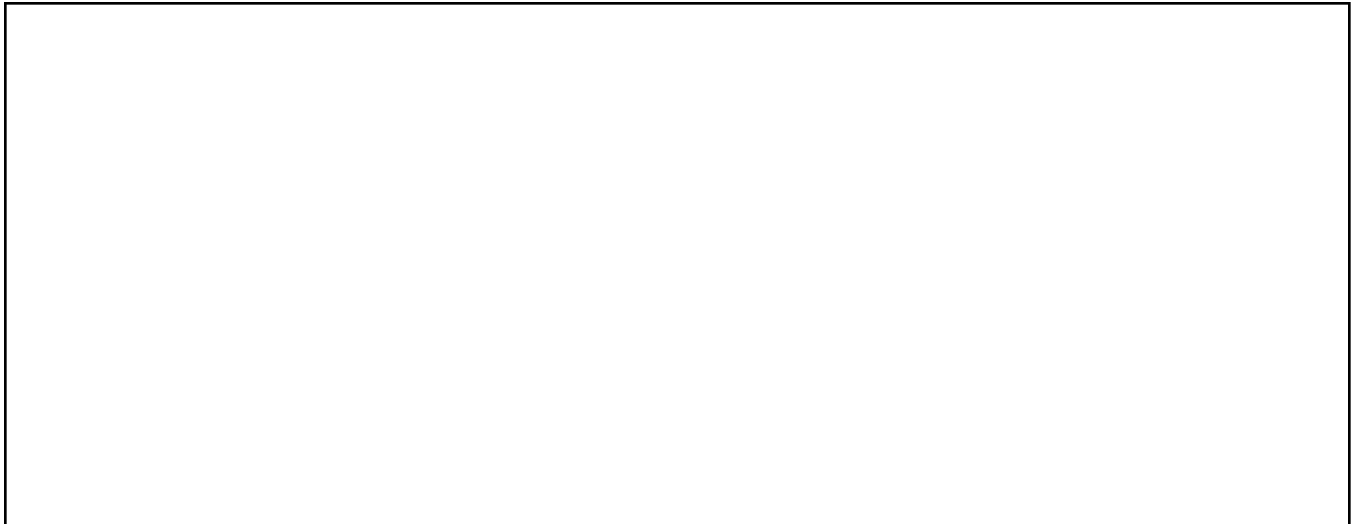
Client Objectives	
Customer's Objectives and Goals - <i>e.g.</i> why do they use?	#1 #2 #3 List all goals and objectives here
Value Props that align to Customer's goals and objectives <i>(if appl - KPI / Success Metrics that tie to this)</i>	
Potential Obstacles or Objections - How do we plan to pre-empt or overcome these objections?	

Relationship Map of Key Stakeholders

In this section, we should identify those who can help strengthen the Company's relationship and also those who might be blockers. Do we have paths to warm introductions for new stakeholders? For blockers, how do we plan to mitigate their objections?



Strategy for the Account



Outreach Strategy

What outreach techniques will you use? When? To whom? At what frequency? Relevant testimonials?

