

ACCOUNT REVIEW

Account Manager _____

Profile

Account: _____ Division: _____

Customer Type: Change Growth Status Quo Pleased & Proud

Ownership: Private Public Government Association

Industry: _____ Yearend: _____ Revenue: _____ Employees: _____

Their Major Competitors: _____

Comments: _____

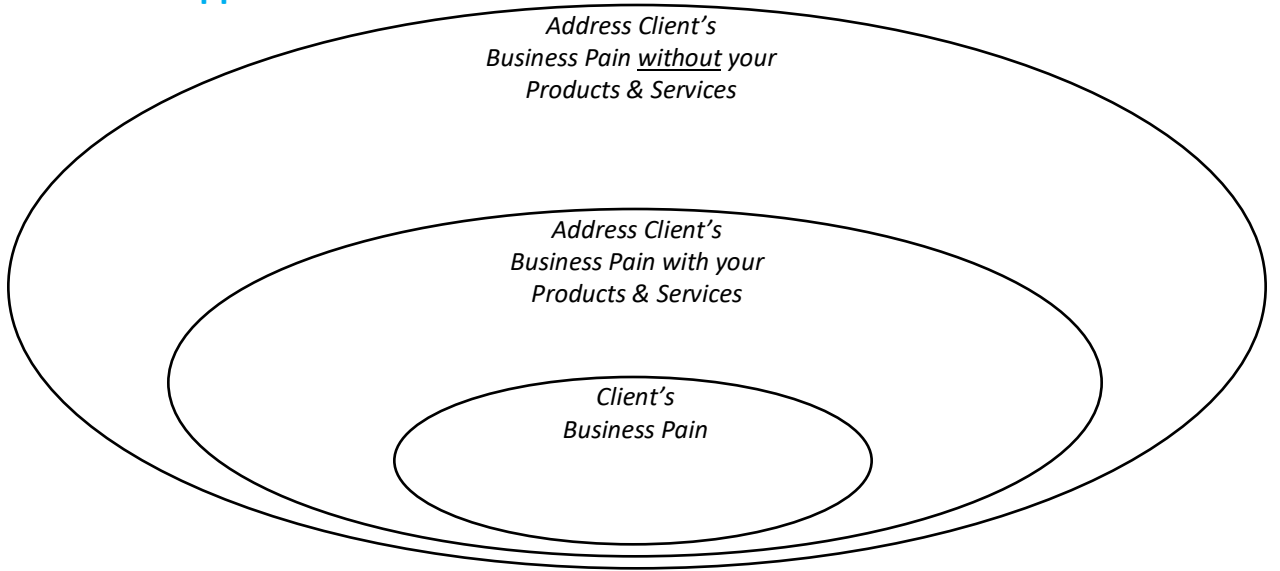
Contacts

Key Contacts	Title	Phone	Email	Lion	Otter	Beaver	Retriever
_____	_____	_____	_____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
_____	_____	_____	_____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
_____	_____	_____	_____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
_____	_____	_____	_____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
_____	_____	_____	_____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Business Pain

"What are the most challenging business issues your organization is faced with?"

Consultative Approach



Revenue History/Plan

Revenue History: 2019 _____ 2020 _____ 2022 _____ 2023 _____

Revenue Future: 2024 _____ 2025 _____ 2026 _____ 2027 _____

Our Competitors: _____ Our Share: _____

ACCOUNT REVIEW

Account Manager _____

Account Plan

Account: _____

Meeting Date: _____ Meeting Location: _____

Customer Team

Name Title

Our Account Team

Name Title

Account Review Agenda

Business Review: *(satisfaction & expectation review of our business history to-date)*

Agenda Topic	Required Action	Owner	Date
1)	_____	_____	_____
2)	_____	_____	_____
3)	_____	_____	_____
4)	_____	_____	_____

Current Initiatives: *(planning & implementation of work in progress, existing projects)*

Agenda Topic	Required Action	Owner	Date
1)	_____	_____	_____
2)	_____	_____	_____
3)	_____	_____	_____
4)	_____	_____	_____

Future Plans: *(understanding of future business plans, new solutions & opportunities)*

Agenda Topic	Required Action	Owner	Date
1)	_____	_____	_____
2)	_____	_____	_____
3)	_____	_____	_____
4)	_____	_____	_____

Comments:

Next Account Plan Meeting: _____ Location: _____