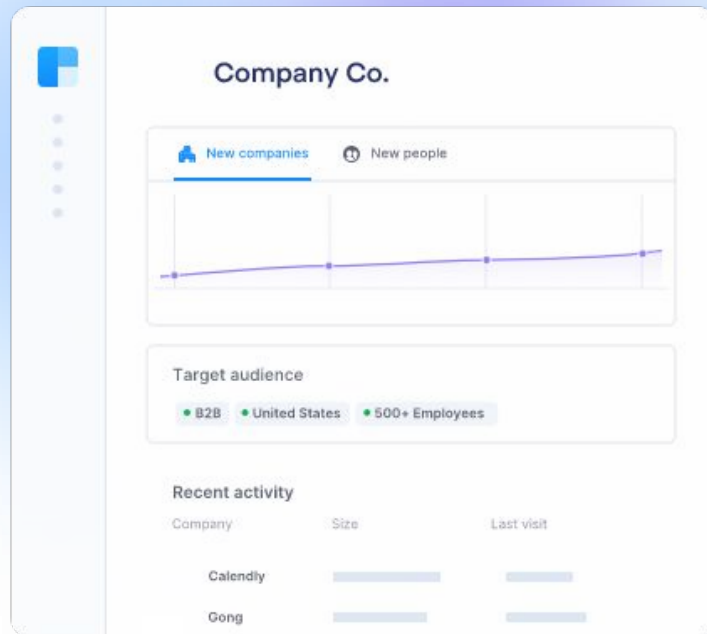


Strategic Account Planning Template

Enterprise Sales

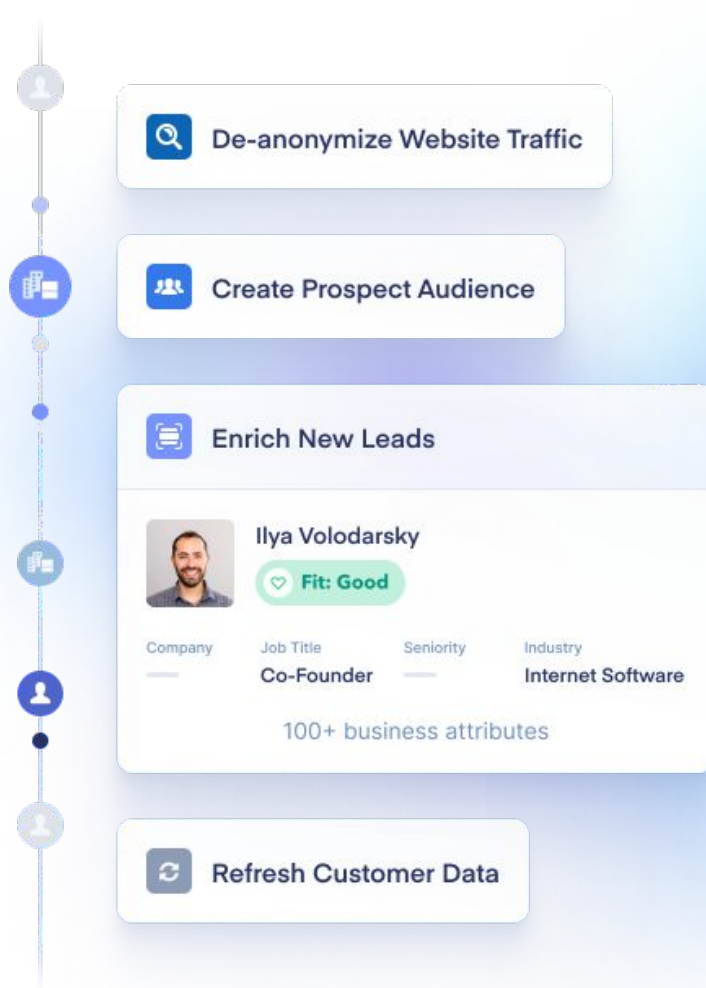


Add Client Logo

Table of Contents

1. Business Overview
2. Opportunities & Risks
3. Relationship Strategy
4. Action Plan

Strategic Account Planning template is meant to be used for top accounts





Company Name	Add Name
Company Size	Employee Size
Industry	Industry
Company Vision & Mission	<ul style="list-style-type: none">• What does this company do?• What services do they provide?• Who are their key competitors?
Company Target Markets & ICP	<ul style="list-style-type: none">• Describe company's target market(s), including buyer personas, market size
Business Initiatives & Projects	<ul style="list-style-type: none">• Current State:• Desired State
KPIs	<ul style="list-style-type: none">• How do your client's measure success?

Top Opportunities

- What are your client's biggest challenges we can solve for?
- What are the top opportunities or growth levers for this account?
- For each opportunity, why is Clearbit the best solution.

Key Evaluation & Decision Criteria

- What are the primary evaluation criteria?
- How will this decision be made and what is the buying process?

Risks & Contingencies

- What are the biggest risks in closing this deal?
- Are they exploring competing solutions? If so, who are they?
- What is your plan to address key risks including competitive alternatives?

Your Target ICP

- Identify which job title(s) you're targeting, how many of those exist in the account you're planning for, and what use they have for Clearbit.

Key Players

- Who are the key decision makers?
- Who are the key influencers?
- Who are/can be your key champions?
- Who are potential detractors?

Engagement Strategy

- What actions will you take to grow engagement and nurture key relationships?
- Do you have any internal executives who can help champion this account?

Action Plan

1. List out the key step needed to achieve your goal with this account
2. List out the key step needed to achieve your goal with this account
3. List out the key step needed to achieve your goal with this account

Resources & Support

1. What additional support or resources do you need to execute this plan?

