

Key Account Management Form

Date:

AE	<input style="width: 95%;" type="text"/>	Account	<input style="width: 95%;" type="text"/>
AE Phone	<input style="width: 95%;" type="text"/>	Agency	<input style="width: 95%;" type="text"/>
AE Email	<input style="width: 95%;" type="text"/>	Category	<input style="width: 95%;" type="text"/>

Financial Objectives THIS YR. NEXT YR.

Based upon the buyer style of the decision maker, identify opportunities or challenges:

Opportunities	Challenges

4 People Who Drive This Account

Coach	Title	Style	Relationship Stage				
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	1	2	3	4	5

What I will do to move this person to the next Relationship Stage:

Decision Maker	Title	Style	Relationship Stage				
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	1	2	3	4	5

What I will do to move this person to the next Relationship Stage:

Influence/Technical Buyer	Title	Style	Relationship Stage				
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	1	2	3	4	5

What I will do to move this person to the next Relationship Stage:

Blocker	Title	Style	Relationship Stage				
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	1	2	3	4	5

What I will do to move this person to the next Relationship Stage:

What problems or unmet opportunities do I know, or think the client has?

Problem Questions I Will Ask

Contact

Problem Questions

Contact

Problem Questions

Contact

Problem Questions

ACTION PLAN

Actions Must Be Measurable, Obtainable and Time Bound

Completed by:

NEXT "5" DAYS			
NEXT "20" DAYS			
NEXT "60" DAYS			

4 People Who Drive This Account

Coach	Title	Style	Relationship Stage					
			1	2	3	4	5	

What I will do to move this person to the next Relationship Stage:

Decision Maker	Title	Style	Relationship Stage					
			1	2	3	4	5	

What I will do to move this person to the next Relationship Stage:

Influence/Technical Buyer	Title	Style	Relationship Stage					
			1	2	3	4	5	

What I will do to move this person to the next Relationship Stage:

Blocker	Title	Style	Relationship Stage					
			1	2	3	4	5	

What I will do to move this person to the next Relationship Stage: