

Account Management Checklist

A key client account plan should include the following:

- Business overview
- SWOT analysis
- Client's key priorities and initiatives
- Client's key people
- Identification of where their pain is
- Annual revenue to the business
- Short term growth plans 6-12 months
- Strategic revenue growth plans for 12-24 months
- Our value proposition
- Our internal resources (team)
- Competitor knowledge