Core Account Name: Account Owner:

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| --- | --- |
| Current Status | Describe the current relationship between the account and your company. Have they bought from you in the past? Are they currently? Are you their trusted advisor, vendor, or adversary? |
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| Strategic Approach | In one to three sentences, describe your approach to winning more business from this account. This is not about goals or next steps – this is a general statement. |
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| Value We Can Offer | What do you offer that will resonate with this account? Why should they consider doing business with you? This can get as granular as naming products, or it could be high level. |
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| Key Contact | Role / Title | Relationship w You | Notes |
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