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# Account Plan Template – short version

**Customer Profile:**

<b>Customer:</b>			
Key decision maker name:		Key Influencer name:	
Location:		Business activity:	

**Potential Vol and margins not currently supplied by our company:**

Products	Est volume Purchased from all suppliers	Est Margin purchase from all suppliers	% Vol we can aim	% margin we can obtain

**Why does the customer buy from us?**

- 1.
- 2.
- 3.

**Our SWOT @ customer**

	<b>Strengths</b>	<b>Weaknesses</b>
1		
2		
3		
	<b>Opportunities</b>	<b>Threats</b>
1		
2		
3		

Conclusion SWOT:

We need to

**Account Objectives 201\_\_**

	Objectives 201__ (SMART)	Deliverable	Timing	Status
1				
2				
3				