

Account Plan Canvas

Account:

Plan Owner:

Plan Period:

Account Hypothesis

Why do we believe we can help?

Account Overview

What do they do, who are their key customers, what is their annual revenue, who are their key competitors?

Their Team

Sponsors, champions, influencers, users

Our Team

Execs, GTM, Technical, Legal, RevOps

Their Strategy and Objectives

What is their vision, how are they structured, where do they play, how do they compete, what challenges do they face?

Value Proposition

What pain is their team trying to avoid, what gains are their team trying to achieve? How can we uniquely deliver them?

Current Relationship

What do they buy today, how is the adoption, how likely are they to renew, how can we make them happy?

Action Plan

What is our short term goal (<6 months), what is our long term goal (1-2 years), which strategies will we deploy, who needs to be aligned to the account?