Account expansion plan template

To ensure your high-value accounts continue to renew and expand, an account plan may be needed. This will help you to keep all your account information and actions in one place - hopefully keeping your high-value accounts happy.

After making sure your account needs an expansion plan you can use this template to get started - make a new plan for each account you are looking to expand. Make sure you update this document regularly to keep your customer information up to date.

| **[Account Name]** |
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| **Step 1: Account overview** |
| * Use this section to outline key information about the account, this could include:   + Business model and industry   + Customer’s vision/mission/goals   + Key numbers   + Popular target markets for customer’s industry * Try to understand their business objectives, challenges, and industry landscape. |
| **Step 2: Key business initiatives** |
| * This section will outline the priorities for your customer, try asking questions like:   + What are your customer’s short-term priorities?   + What are your customer’s long-term priorities?   + What are your customer’s key projects?   + What KPIs are they using? |
| **Step 3: Customer relationship** |
| * Who are the key stakeholders/decision-makers for this account?   + Are there people you should know but don’t? * How does this customer account prefer to be contacted? * Which members of your team have worked with this customer? * How long is the relationship with this account? |
| **Step 4: Product and revenue** |
| * List any products or services you provide the customer.   + How do these offerings bring value to the customer? * What is the revenue gained from these products/services?   + What is the ROI on this? * What other products/services could benefit this account? |
| **Step 5: Competitive analysis** |
| * By understanding your customer’s challenges you can help to offer them solutions. Make a note of:   + Your customer's key competitors.   + Competitor strengths.   + Competitor weaknesses. |
| **Step 6: Key buying and selling points** |
| * For each key stakeholder/decision maker, identify:   + The evaluation criteria they use.   + The decision criteria.   + Challenges they face.   + Key selling points. |
| **Step 7: Relationship goal** |
| * What is your current relationship with this account? * What is the goal relationship for this account? (Preferred supplier? Advisor?) * How can you engage the customer and boost the relationship? |
| **Step 8: Change management** |
| * Opportunities   + What customer problems can you solve?   + Upsell and cross-sell opportunities. * Risks   + What risks, barriers, or limitations are there?   + What reservations or concerns does your customer have?   + Operational restrictions. * Goals   + Two year revenue goals.   + Relationship goal. * Make a list of reasons why change is good and why change is bad. Add weight to each point and take away the bad score from the good score.   + If you get a number above zero, your plan is likely to succeed.   + If zero or less then you may need to rethink the plan. |
| **Step 9: Action plan** |
| * Identify key objectives and KPIs. * Create a resource list. * Assign tasks, account owners and define a timeframe. * How often will the plan be updated? * How will the plan be shared? |
| **Step 10: Review** |
| * Discuss co-creation with your customer? * Is the plan still working? * How often do you update your customer? In what format? |

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