

# 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.

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## 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?

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## Step 3: Customer relationship

- Who are the key stakeholders/decision-makers for this account?
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- 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?
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#### **Step 4: Product and revenue**

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- 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?
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#### **Step 5: Competitive analysis**

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- 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.
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#### **Step 6: Key buying and selling points**

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- For each key stakeholder/decision maker, identify:
    - The evaluation criteria they use.
    - The decision criteria.
    - Challenges they face.
    - Key selling points.
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#### **Step 7: Relationship goal**

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- 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?
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## Step 8: Change management

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- 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.

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## Step 9: Action plan

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- 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?

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## Step 10: Review

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- 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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**P.S.** We've got a whole course on honing your [CS leadership skills](#). Why not check it out?