Account research template

Researching a new potential customer can be a daunting task. How do you get started and what do you need to know? Don’t panic - this account research template will help you find and target the right people.

| **[Account Name]** | |
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| **Account overview** | * Business model and industry * Customer’s vision/mission/goals * Key numbers * Popular target markets for customer’s industry * Estimated budget |
| **Business strategy** | * Account’s business objectives * Challenges * Industry landscape * Short and long-term priorities * Key projects * KPIs |
| **Needs and motivations** | * Pain points * Why do they need your product/service? * Solutions your product/service can offer * Must-haves |
| **Organization chart** | * Who is vital to approving decisions? * Do you have a champion? Could any of your contacts become champions? * Are there people you should be in contact with but aren’t? |
| **Competitive analysis** | * Who is the account’s competition? * Key strengths of competition * Key weaknesses of competition |
| **Buying process** | * Steps involved in the process * How long will the buying process take? * What will potentially hold up or stop the process? |