

ACCOUNT MANAGEMENT · TEMPLATE

Account Plan Template

A one-page working document for tracking goals, stakeholders, risk, and expansion for any account that warrants a named owner.

How to use this: Fill one of these per account in your high-attention segments. Revisit and update it at each scheduled review rather than starting from scratch.

Account Snapshot

Account name

Segment (High-value/High-risk, High-value/Low-risk, etc.)

Account owner

Contract value / ARR

Renewal date

Last review date

Customer Goals

What is this customer actually trying to achieve with your product, in their language, not yours.

Primary business outcome they're chasing

How they currently measure success

What would make this a clear win for them by renewal

Key Stakeholders

Map the people who matter, not just your main contact.

Name	Role	Influence (Champion / Neutral / Blocker)	Notes

Risk Assessment

Top risk to this renewal

What would reduce that risk in the next 30 days

- ☐ Check usage trend over the last 90 days (up, flat, down)
- ☐ Confirm the champion is still in role and engaged
- ☐ Note any unresolved support escalations
- ☐ Identify any competitor or budget-cut signals
- ☐ Flag any contract terms or pricing friction ahead of renewal

Expansion Opportunities

Underused feature or module this customer would benefit from

Team or use case within the account not yet using the product

Realistic expansion value if pursued this year

90-Day Plan

Three concrete moves, each with an owner and a date.

Action	Owner	Target Date	Status

Next Scheduled Review

Next review date

What needs to be true by then