

Preliminary Account Planning Guidelines

1. Executive Summary:
 - Why this client
 - Why now
 - Potential revenue

2. Current Activity Overview:
 - Client Contact(s)
 - CSC Contact(s)
 - Current Revenue
 - Historical Revenue

3. Revenue Targets:
 - Short term and long term strategy
 - Potential Risks/Mitigating Factors

4. Value Proposition to Client:
 - Products/Solution

5. Competitive Situation:
 - History

6. Planned Activities:
 - Tactics
 - Timeline
 - Responsibility

7. Resource Requirements:

8. Next Steps: