Account Development Plan – [Insert Client Name]

Account Owner

Client description:
Date of Review:
Date of Next Review:

Insert Client Logo

12 Month objectives for account:

Outline of Confirmed Business 19/20

Proposed Business

Financial Information

19/20 forecast turnover and GP: £ £

19/20 turnover and GP:

Background (to Client / Agency Relationship) and Current Issues

Key Contacts

Name	Title	Role	xx Main Contact	Relationship score (1 – poor, not well established to 5 - excellent)

Other contact note:

Secondary Contacts

Name	Title	Role	Client Main Contact	Relationship score (1 – poor, not well established to 5 - excellent)

STRENGTHS

1.
2.
3.
4.

WEAKNESSES

1.
2.
3.
4.

OPPORTUNITIES

1.
2.
3.
4.

THREATS

1.
2.
3.
4.

Competitor Activity

NEXT ACTIONS FOR 2019/20

Objective	Detailed Actions	Who – Client	Who - xx	Date	Completed?

Objective	Detailed Actions	Who – Client	Who - xx	Date	Completed?