OSTERMAN
SALES & PARTNERSHIPS

Account plan worksheet

My company: _____ **Account:** _____ **Date:** _____

1 Why now

What's changing at this account that makes now the time? New funding, launches, hiring, new leaders.

2 Who to reach

Who decides and owns the budget, who'd champion you, and who else weighs in.

3 How you get in

Warm intros, shared connections, events, or the channel they actually answer.

4 Pain points

What's slowing them down or costing them money that you can help with?

5 Your first message

What you'd say first, and why they'd care.