



Key Account Roadmap

Primary objectives/strategy
Primary concerns for success
Primary short term objectives

Date		
Account/Prospect		
Sales person		
Project		
Product		
Current sales	\$	#
1999 sales goal	\$	#
Long term sales pot'l	\$	#
Priority	<input type="checkbox"/> Critical <input type="checkbox"/> Can slip	<input type="checkbox"/> Important <input type="checkbox"/> On Hold
Competitive position	<input type="checkbox"/> We own <input type="checkbox"/> Equal	<input type="checkbox"/> Strong <input type="checkbox"/> Weak

Key Personnel

Name*	Title	Type	Attitude	WIIFT	Concerns
1.					
2.					
3.					
4.					
5.					
6.					
7.					
8.					

* Maintain, on your data base software, info on each. Include business interests, communication preferences, birthdays, hobbies, dos & don'ts, etc.

Type of buying influence	
1. Coach	Supports your program and guides you in the sale. Must be in position of influence.
2. Decision Maker	Often a non-Purchasing Dept executive. Makes <u>the</u> decision, typically with support of others. Commits the funds.
3. Economic	Typically your purchasing contact. Often reports to Decision-Maker.
4. Technical	Judges on technical merits. Can't say yes, often says no.
5. User	Wants ease of use and NO problems.

Attitude toward project	
+2	Total support.
+1	Very supportive
0	OK if there are no problems
-1	Some Concern
-2	Negative