

STRATEGIC SALES ACCOUNT PLAN

Client: Northern Distribution Company

Universal Sales Company



Submitted by:

Client Team Leader: Robert Sellingmore

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Document Objective

The purpose of this plan is to document information about the account in a single document and to identify opportunities for a long-term relationship within the Northern Distribution Company that will bring in continuous business development opportunities. This sales account plan also details the strategy for taking more of NDC's purchases from our competitors.

Northern Distribution Company Team Background

Northern Distribution Company Revenue Objectives

Generate \$1,500,000 in revenues for 2009

Team Contact List

Name	Title	Telephone Number	E-mail Address
Robert Sellingmore	Client team leader	555-555-1212	bsellingmore@Usc.com
Steve Servicemore	Client Relationship Manager	555-555-1213	sservicemore@Usc.com
Jeanine Nonebetter	Client Service Representative	555-555-1214	jnonebetter@Usc.com

Key hires

Account service representative added when sales get to \$750,000 this year

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Historical Business Performance Summary

[Describe the past projects and performance with this client, including specific successes and failures.]

2008 Revenues \$1,000,000

Product category A	\$ 250,000
Product category B	\$ 275,000
Product category C	\$ 350,000
Product category D	\$ 50,000
Various other categories	\$ 75,000
	\$
	\$
	\$
	\$ _____
Total Sales 2008	\$1,000,000

Current Orders and Contracts

[List the current orders or contracts with this client and the status of each order or contract and the revenue that will carry for those orders or contracts into the plan year:.]

<u>Current Projects</u>	<u>2009 Revenues</u>
Sales Order #4553	\$ 15,000
Sales Order #4678	\$ 7,500
Product Contract Minimum purchase agreement	\$ 75,000

Total	\$ 97,500

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Northern Distribution Needs

[Summarize the benefits that the customer expects from a longer-term relationship.] What are the strategic plan goals of the Northern Distribution? How do they want Universal to support their basic business model?

Northern expects their sales of Universal's current product line to exceed 2008 levels by 30%. Northern is entering a new product relationship with 10 of its key clients. They need Universal to provide the products that they will sell to those new clients.

How Universal offers Value Proposition

[Describe the account team's value proposition—a statement of intent to deliver a measurable business result that the client views as a critical prerequisite or outcome for the client's success.]

Annual and quarterly business reviews will be done with the client. During the annual review the team will ask for a critique of the strengths and weaknesses in Universal's delivery to Northern. Action plans will be prepared and presented to Northern detailing areas of service and product improvements. Quarterly reviews will include updates on action plans and changes in the business plans of Northern and how Universal partners with them to provide world class products and services to their clients.

Business Development Opportunities

Clients and projects

10 New clients with product lines	\$ 250,000
New product lines to Northern	<u>\$ 250,000</u>
Total Growth of revenues from Northern	\$ 500,000

Business Development Strategies

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[Describe the account team's strategy, objective, and tactics for pursuing the indicated business development opportunities listed above.]

10 new clients with product lines

- + Review marketing efforts of Northern sales team. Coordinate providing them product literature and sales support to each client call.
- + Assist Northern in developing sales account plans for the 10 targeted new clients
- + Coordinate marketing and website information to support Northern in their sales efforts to the clients.

New product lines to Northern

- + Identify related product lines that will support or augment the current products purchased by Northern from Universal.
- + Identify related product lines that will support or augment the current products purchased by Northern from our competitors.
- + Present Universal product lines that will replace competitor lines being purchased by Northern.
- + Establish pricing programs that provide incentive to Northern to switch their purchases from competitors to Universal

Action Plan

[List the major action items that the account team will take on for each identified business development opportunity.]

Action	Person Responsible	Time Frame (date or frequency)
10 New Clients		
Meet with client and identify their 10 target clients	Sellingmore	February 1
Assist client in	Servicemore and Nonebetter	February 15

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Client: **Northern Distribution Company** Strategic Account Business Plan

developing sales account plan for each of the 10 new clients		
Provide sales support to Northern with joint presentation and media preparation	Sellingmore, Servicemore and Nonebetter	February 28
Future Action		
Future Action		
Future Action		
Action		
New Product Lines		
Identify competitive lines purchased by Northern	Sellingmore	January 31
Create sales plan that maps competitor products to Universal products	Nonebetter and purchasing	February 15
Prepare product line presentation to Northern with media and pricing	Sellingmore, Servicemore and Nonebetter	March 1
Future Action		
Future Action		
Future Action		
Future Action		

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Client: **Northern Distribution Company** Strategic Account Business Plan

Required Resources

[Create a list of projected resources needed to successfully carry out this client plan.]

- ✚ Media for new product to be offered to Northern from our suppliers
- ✚ Website updates to include new products and information about the products
- ✚ Pricing from our suppliers
- ✚ Review of our pricing by the CFO

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