Key Account Worksheet

1. General Information:

Name	
Address:	
Phone:	
Market Segment	
Size and scope of this operation	
Background / History	
Personal / Business Goals	

2. What are the relevant changes facing this account?	**What is the speed these changes are taking place?**	**How do I view these changes (as opportunities / threats)?**

3. Mutually agreed business problems, needs or issues for which I might have solutions.			
- Operational - Problems that impact the farm's ability to run better, faster, more efficiently	**- Financial -** Issues that impact the farm's bottom line (cash flow, costs, etc.)	**- Production -** Problems that impact the farm's revenue and production capability	**- Personnel -** Issues that limit employees from doing a better job and being more successful

4. Product / service bundles that will address this account's problems, needs and issues… *(See Market Development Plan, Page 3 – "Product and Services Focus" for this Market Segment)*
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Key Account Worksheet

Situation Analysis:

5. Stage of account development (dates)	Preparation	Investigation	Agree / Present	Commitment

6. Buying Influences: Roles*: E = economic U = user T = technical C = coach
Buying Styles: Styles**: R = Relationship Buyer P = Price Buyer B = Business Buyer

Name, Title	Role*(s)	Receptivity	Influence	Buying Style**

7. Summary of my "position" with the key buying influences

Strengths	Econ	
	User	
	Tech	
	Coach	
Red Flags	Econ	
	User	
	Tech	
	Coach	

8. Company Resources that would have application in this account

People	Programs	Information / Knowledge

9. Next Steps / Action Plan

Action	Responsibility	Timing / Date

Notes	

Key Account Worksheet

10. Business Potential / Sales goals for this Key Account:

Unit Volume	Last Year	This Year’s Expectations	Five Year Potential
Dollar Volume	Last Year	This Year’s Expectations	Five Year Potential
Client Priority	Score (0-5)	Notes	

11. Win-Win Results -- *See page 1, number 3 for this Key Account. Make sure that the different buying influences agree with the problems, needs and issues that have been identified.*

My Objectives and Goals	This Key Account’s Objectives and Goals

Conclusion (Is this a qualified partnership?)	

Key Account Worksheet

12. Questioning Strategy: There are six categories of information that should be collected from Key Accounts. This information is *dynamic*, i.e. it is subject to change. Customer focused Field Marketers make a continuous effort to investigate and update their knowledge in these areas of critical account information. The categories include the following information:

- How are (and who makes) buying decisions in this account?
- What are the current business / performance goals of this account?
- What are the current business / performance practices of this account?
- What are the expectations / how are suppliers evaluated who serve this account?
- What are the unmet needs / problems for which I can provide solutions?

Prior to each sales contact with this key account, record below any questions that you will ask that will provide answers and / or clarify the above information. Following the sales call, note answers that were provided and list additional follow-up questions for the future.

Fact-Finding Questions: These are about the *facts, information, background, or details.* They are designed to *learn more about the prospect's situation.*

Questions	Response

Need-Finding Questions: These questions *explore problems, difficulties, and dissatisfactions.* They also highlight the *implications or consequences of the problems.*

Questions	Response

Benefit-Matching Questions: These questions are *about the value or usefulness of a particular course of action or a proposed solution.*

Questions	Response