**Business Name**



**Strategic Business Planner**

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**Account Background**

Objective

Client Profile

Client Business Objectives and Initiatives

Client Organization Chart

Client Contact List

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Title** | **Telephone Number** | **E-mail Address** |
|  |  |  |  |
|  |  |  |  |
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Customer Needs

**Value Proposition**

**Sales Opportunities**

**Sales Strategies**

**Financial Forecast**

**Communication Plan**

**Action Plan**

**Required Resources**

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