



# Key Account Worksheet

Organization Name: \_\_\_\_\_ Date: \_\_\_\_\_

Address: \_\_\_\_\_

City / State / Zip / Country: \_\_\_\_\_

Phone: (\_\_\_\_) \_\_\_\_\_ Website: \_\_\_\_\_

NAISC (Industry) Code: \_\_\_\_\_ Account Type:    Client    Prospect    Target

Fees Last Year: \$ \_\_\_\_\_ Fees this year: \$ \_\_\_\_\_ Projected fees next year \$ \_\_\_\_\_

Current Services Provider: \_\_\_\_\_

Primary Needs: \_\_\_\_\_

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Primary Contact Name: \_\_\_\_\_ Title: \_\_\_\_\_

Email: \_\_\_\_\_ Phone: \_\_\_\_\_

Contact Class:    Top Decision Maker    Top Finance    Top Legal    Other: \_\_\_\_\_

Years at Organization: \_\_\_\_\_ Reports to: \_\_\_\_\_

Previous Employment: \_\_\_\_\_

Trade Group Memberships: \_\_\_\_\_

Hometown: \_\_\_\_\_ College: \_\_\_\_\_

Spouse: \_\_\_\_\_ Children: \_\_\_\_\_

Golf: Yes / No    Military: Yes / No    Political: Dem / Rep / Ind    Religion: \_\_\_\_\_

Favorite Restaurants / Activities: \_\_\_\_\_

Business Goals: \_\_\_\_\_

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Who are other participants in the decision making process at the organization? \_\_\_\_\_

What is the next opportunity we should pursue for this account? \_\_\_\_\_

What are the priorities of client / prospect? \_\_\_\_\_

What else should we know about this organization? \_\_\_\_\_