

# Target Account Planning Worksheet

Name:

## SECTION 1: Account Information

Account name:

Decision maker:

Influencers:

Source:

Insurance company:

## SECTION 2: Planning

Why is this a  
targeted account?

What do I know  
about the current  
relationship?

What's my  
competing advantage  
and how I can I use  
it?

Who can be my best  
advocate to help me  
getting this account  
& how will I use  
them?

## Key Action Steps

What are three actions I can take to secure a meeting/appointment?

1.

2.

3.