

Account research template

Researching a new potential customer can be a daunting task. How do you get started and what do you need to know? Don't panic - this account research template will help you find and target the right people.

[Account Name]

Account Overview

- Business model and industry
- Customer's vision/mission/goals
- Key numbers
- Popular target markets for customer's industry
- Estimated budget

Business strategy

- Account's business objectives
- Challenges
- Industry landscape
- Short and long-term priorities
- Key projects
- KPIs

Needs and motivations

- Pain points

	<ul style="list-style-type: none">• Why do they need your product/service?• Solutions your product/service can offer• Must-haves
Organization chart	<ul style="list-style-type: none">• Who is vital to approving decisions?• Do you have a champion? Could any of your contacts become champions?• Are there people you should be in contact with but aren't?
Competitive analysis	<ul style="list-style-type: none">• Who is the account's competition?• Key strengths of competition• Key weaknesses of competition
Buying process	<ul style="list-style-type: none">• Steps involved in the process• How long will the buying process take?• What will potentially hold up or stop the process?