

Account planner

Complete one copy per account. Record buyer evidence, not assumptions. Blank fields are editable.

Account / organization

Account owner / review date

Proposed product and scope

Verified trigger / source / date

01 / THE BUYER AND THE PROBLEM

Problem the buyer has confirmed

Baseline metric / source / target agreed with buyer

HCP or user / role / evaluation need

Executive or budget owner / priority

02 / EARN ATTENTION AND TEST FIT

One relevant reason to contact them + one small next step

Evidence to send / delivery effort to disclose

Next customer action / owner / date

Closure planner

Complete with the sponsor and purchasing owner. A requested date is not a confirmed close date.

Account

Customer cutoff / what must happen by then

Budget owner / usable amount / confirmation date

Funding restrictions / fiscal year / PO or delivery rule

03 / WORK BACKWARD FROM THE CUSTOMER CUTOFF

STEP	OWNER	DUE DATE	EVIDENCE / BLOCKER
Scope & success criteria			
Evaluation accepted			
Technical / data review			
Funding approval			
Contract / signature			
Vendor setup / PO			
Delivery / acceptance			

Largest unresolved risk / resolution owner / date

Forecast: commit, develop or move / reason / next review date

Use it in a real deal review

Keep the plan with your opportunity record. Update it after buyer conversations, not just before forecast calls.

01 / Complete the account sheet before outreach

Check the trigger and contact role. Write one problem you can credibly investigate. If the buyer has not confirmed it, label it a hypothesis. Pick one useful artifact to send before asking for a meeting.

02 / Match the ask to the person

HCP: offer a brief workflow example and disclose evaluation effort. Executive: send a decision brief covering scope, evidence, cost and delivery. Confirm who influences, approves and signs; an affiliation or title does not establish authority.

03 / Confirm funds with the person who controls them

Ask: "Is funding approved for this scope, and what must happen before the cutoff?" Record the answer and date. Unspent money may be reserved, restricted or unavailable. Do not assume every account has a December fiscal year-end.

04 / Build the closure plan with the buyer

Enter an owner and date for every applicable step. Mark a step N/A only after the responsible buyer confirms it is unnecessary. Include implementation capacity, absences and any required reviews. Replace vague status with evidence, such as "finance approved scope on Oct 15."

05 / Make the forecast decision

COMMIT: confirmed priority, usable funding and a workable approval path with buyer owners and dates. DEVELOP: real need but evidence or owners still missing. MOVE OUT OF Q4: a required decision, review or delivery condition cannot finish before the customer cutoff.

06 / Keep the commercial discussion honest

Ask: "If we resolve price, what else prevents approval?" A discount cannot fix missing sponsorship or implementation capacity. A smaller scope must deliver useful standalone value and have an agreed evaluation and next decision date.

Research the account. Validate with the buyer.

Explore organization, HCP and executive intelligence at www.intent.health.