

Account Profile – ATM & N

Please complete this prior to training and bring it with you when you attend our seminar. The objective of this exercise is to profile an account, customer or prospect to the best of your ability at this point.

With this information, you can apply the material to a “real world” situation plus ask more specific questions. This will increase the value of the course to you, plus create ideas on how to break into and sell to more difficult or competitive accounts.

Include as much information as possible. The more we know, the more likely we are to come up with a solution and successful plan of attack. If you do not know the information requested but have tried to get it, list some of your activities. This is all part of the development process.

1. Name and location(s) of the prospect, customer or account:
2. **Authority Pyramid** – list the names and job titles of the (relative to your product/service):
 - a. Decision Makers
 - b. Influencers
 - c. other(s)
3. **Time Frame** to:
 - a. their next purchase
 - b. how often they purchase
4. **Money** – Price/Cost/Budget (for the products/services you supply):
 - a. how much do they usually pay?
 - b. what is the budget?
5. **Need** – products/services you supply that this customer:
 - a. needs
 - b. can produce on their own
 - c. is buying from a competitor