**[A picture containing text

Description automatically generated](https://www.smartsheet.com/try-it?trp=11733&utm_source=integrated-content&utm_campaign=/content/account-planning-templates&utm_medium=Simple+Account+Plan+doc+11733&lpa=Simple+Account+Plan+doc+11733)SIMPLE ACCOUNT PLAN TEMPLATE**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
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| CREATED BY | |  |  | | |  | |  | | |  | |  | | |  | |  | | |  | |  | | |  | |  |
| Name | | | | | | |  | |  | | |  | |  | | |  | |  | | |  | |  | |  | |  |
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| GOAL | |  |  | | |  | |  | | |  | |  | | |  | |  | | |  | |  | | |  | |  |
| Provide the goal and vision for your plan. | | | | | | | | | | | | | | | | | | | | | | | | |
| ACCOUNT PLAN TEAM | | | |  | | |  | |  | | |  | |  | | |  | |  | | |  | |  | |  | |  |
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| PROJECT ACCOUNT ACTION PLAN | | | | | | | | | | | | | | | | | | | | | | | | |  | |
| ACTION STEP | | RESPONSIBLE | | | DESCRIPTION | | | | | STATUS | | | | | OUTSIDE SHAREHOLDERS | | | | | NOTES / CONSTRAINTS | | | | |  | |
|  | |  | | |  | | | | | ACCEPTED | | | | |  | | | | |  | | | | |  | |
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