Client Success Hub

Account Growth Plan Template

1. Client Overview

Client Name:

Industry:

Account Owner:

Current Products/Services:

Contract Renewal Date:

Key Contacts:

2. Business Objectives & Priorities

• List client's top business goals relevant to your solution.

• Note any recent changes in strategy or market conditions.

3. Current Account Status

• Summary of current usage, product adoption, or engagement.

• Recent successes or wins with your product/service.

• Any known issues or risks.

4. Upsell Opportunities

Opportunity Description	Product/Service	Value to Client	Estimated Timing	Next Steps/Owner

5. Cross-Sell Opportunities

Opportunity Description	Product/Service	Value to Client	Estimated Timing	Next Steps/Owner

6. Long-Term Account Growth Goals

• Outline key milestones for the next 12–24 months.

• Include plans for new products, expansions, or strategic initiatives.

7. Risks & Mitigation Strategies

• Identify potential risks to account growth.

• Outline mitigation plans or required support.

8. Action Plan & Follow-Up

• List immediate next steps with deadlines and owners.

• Schedule follow-up meetings or check-ins.