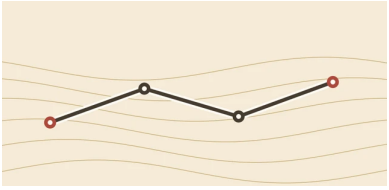
Account expansion plan



We map buying teams and next offers for three existing accounts using supplied records.

Who it helps

Founders and managing directors

The problem to solve

Additional work with existing accounts can be hard to identify when buying roles and past engagement records are disconnected.

Working through the brief

1. **Review three account records**

   Gather the agreed inputs. Current sales channels, account evidence and commercial objectives.

2. **Map buying responsibilities**

   Track “Existing account” and “Buying role” together so the reviewer can connect the source information to the result.

3. **Prioritise relevant next offers**

   Use the plan to organise conversations around documented account needs and evidence of a useful next offer.

4. **Check the scope at handover**

   Third-party data and work beyond the agreed business unit or market are separate.

Worked example

An existing client has a second team with a similar problem. Check need, decision ownership and delivery capacity before proposing expansion.

Read the service scope / STR-023

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