

Account Profiling

Date : _____

Account Managers: _____

<i>Company Name</i>		<i>Country of Origin</i>
<i>Industry</i>	<i>Type</i>	<i>Business Model</i>
<i>Incorporated</i>	<i>Revenue</i>	<i>Mission/ Goals</i>
<i>Yrs in Operation</i>	<i>Paid-up</i>	
<i>No of staff</i>	<i>Mgmt Staff</i>	

<i>Main Contact: Designation:</i>	<i>Secondary Contact: Designation:</i>
<i>Tel : DID: Fax:</i>	
<i>Email:</i>	<i>Other training information:</i>
<i>Influence:</i>	
<i>Main Objections:</i>	
<i>Present Training</i> In-house Outsource Public E-Learning Technical Mgmt Soft Skills Others Effectiveness? Providers? Performance Measurement? Budget: per person: _____ per dept: _____ Training Needs by: Line Mgrs Training Mgr HR Mgr	<i>Who are their Present Providers?</i>
<i>Future Plans for Training</i>	<i>Departmental Goals, Needs and Expectations</i>
<i>Decision Making Process</i>	

My goals for the account – target product and services / timeline / strategic approach