

STRATEGIC ACCOUNT

GROWTH PLAN

Expansion isn't a campaign you launch. It's what happens when confidence is already there to support it. This plan doesn't start with what you want to sell — it starts with whether this account has actually earned the right to be pitched anything yet.

"A customer who trusts you doesn't wait to be sold to. They call when a new need appears, because you're the company they already believe in."

ACCOUNT

Customer

Plan owner

Current stage (Win / Transition / Stabilize / Expand / Renew)

Current confidence trend (Rising / Flat / Spending)

SECTION 1 — HAS THIS ACCOUNT EARNED EXPANSION?

The three things that have to be true before growth is natural instead of a gamble, applied to this account:

- ☐ What Sales promised, what the customer expects, and what Delivery executes are still pointed at the same target — not just at kickoff, but right now.
- ☐ Someone is named accountable for the space between departments on this account, not any one function acting alone.
- ☐ Customer confidence is being watched here as its own signal — not inferred from SLAs.

All three checked means this account is a legitimate growth candidate. Any unchecked box means the real work right now is closing that gap, not planning an upsell.

SECTION 2 – EVIDENCE EXPANSION IS ALREADY HAPPENING ORGANICALLY

Real growth shows up before you pitch it. Check what's already true.

- ☐ The customer has called with a new need before anyone on your team pitched it.
- ☐ This account has added scope, seats, or services in the last 12 months without a sales campaign.
- ☐ This customer has referred a prospect, and you know which one.
- ☐ More of the customer's people have been brought into the relationship over time, not fewer.
- ☐ Executive trust has visibly deepened – more candor, less careful positioning, in your conversations.

None of these checked is not a failure – it's information. It means this plan's real first phase is earning trust, not proposing scope.

SECTION 3 – REMOVE FRICTION BEFORE YOU PITCH ANYTHING

The easiest company to buy more from is the one that's already easy to work with. Adding scope should feel like less risk than starting over somewhere else – not a new negotiation.

Friction point identified on this account (from the customer's side, not your org chart)

The one to remove this month

What the customer has already told you they need

Not what you want to sell them – what they've actually said, in passing or directly.

What they said	When	What it points to / next step

Executive relationship map

Confidence isn't uniform across every stakeholder. Map who actually believes in the relationship, and who hasn't been earned yet.

Stakeholder / role	Relationship strength	Confidence status	Next move

The growth plan

Every opportunity here should be earned, not wanted. If the readiness gate isn't met, the opportunity waits – it doesn't get pitched early to hit a number.

Opportunity	Evidence it's earned (not just wanted)	Owner	Timing

Guardrail – don't pitch, earn

Before raising any opportunity above with the customer, confirm:

- Section 1's three things are all true for this account right now, not "mostly."
- The friction point from Section 3 has actually been removed, not just identified.
- This opportunity traces back to something the customer said, not just something your team wants to sell.

If you can't check all three, the account isn't ready to be pitched – it's ready to have more confidence built first.

Want help building this out across your top accounts? Book an Outcome Execution Gap Session.

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