**Major Account Overview Template**

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| **Major Account Profile** |
| **Category** | **Descriptors** | **Routine** |
| Tier 1 |  |  |
| Tier 2 |  |  |

**Specific Account Plan**

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| **Account Name:** |  |
| **Vision Meeting Plan:** |  |
| **Month** | **Plan for Month** |
| **January** |  |
| **February** |  |
| **March** |  |
| **April** |  |
| **May** |  |
| **June** |  |
| **July** |  |
| **August** |  |
| **September** |  |
| **October** |  |
| **November** |  |
| **December** |  |