



Joint business plan proforma

1. **Brief history of the account**
(how long you have been trading, what has been sold to them, and attached contract)

2. **Key stakeholders**
(who are the key stakeholders, personality profiles, contact details and any other useful information about their interests, attached Buyer-ology® matrix)

3. **Ways of working**
(how you interact with the customer and who does what in the business)

4. **Business Targets**
(what you are trying to achieve together?)

5. **Key milestones**
(if you are delivering a major project for a client, detail the key milestones, how we know if § we have done a good job and how often they need to be revised/revisited?)

6. **Implementation plan**
(e.g. what next – do they repurchase on a regular basis, what you can upsell, innovation needed to ensure that the business continues to grow)