5. Account Planning Outcomes – This section is to be utilized to minute key takeaways from the account planning session and will need to be completed by a member of the team present at the meeting. In addition to the minutes all opportunities / follow up actions identified should be separately logged in dbForce for purpose of future tracking

All RM teams will receive a separate email within the next 24 hours with the financial and pipeline information referenced in sections 3 and 4.

In addition, we will be setting up two open sessions on Wednesday (3:30PM EST) and Thursday (2PM EST) to clarify any questions you may have on how to fill out the template. Details to follow.

Thanks,

Manish

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