

ACCOUNT MANAGEMENT

ELEARNING COURSE OUTLINE

ACCOUNT MANAGEMENT

Note: Courses in Italics are sequenced in from the Sales Effectiveness eLearning.

AM010 – Account Management Introduction 10 min

Profitable growth is dependent on client retention and the five foundational account management components to advance relationships through a “system of reinforcing activities. The program introduces a consistent and professional methodology for managing and growing current accounts.

Account Management Introduction

SE101 - The Four Cornerstones of Success® 60 min

Attitude, Personal Accountability, Perseverance and Habit are the cornerstones to every successful individual, team and organization. Learn to recognize how you use these cornerstones in your daily actions and where you can or should make adjustments that will lead to great results.

Four Cornerstones of Success - Introduction

Lesson 1: Attitude

Lesson 2: Personal Accountability

Lesson 3: Perseverance

Lesson 4: Habit

Key Learning - Four Cornerstones of Success

AM113 – Developing Strong Relationships 60 min

B2B relationships are only as good as the person-to-person relationships within; make sure yours are strong. Cultivate loyal client relationships by matching their communication styles and discussing the right issues with the right people. Follow the 3X3 rule to expand your web of influence and protect your account from the risks created by departures and personnel changes.

Developing Strong Relationships – Introduction

Lesson 1: Assessing Relationships

Lesson 2: People Reading

Lesson 3: Relationship Mapping

Lesson 4: Expanding Your Web of Influence

Key Learning – Developing Strong Relationships

AM111 – Minimizing Client Risk 45 min

Client retention requires an understanding of factors that can jeopardize the client relationship. You will learn about the correlation between client risk and client retention, the value and importance of retention, recognizing and responding to client risk, and the impact of changes in relationships over time.

Minimizing Client Risk – Introduction
Lesson 1: Recognizing Client Risk
Lesson 2: Warning Signs
Lesson 3: Protecting Against Competition
Key Learning – Minimizing Client Risk

AM103 - The Buying/Decision Process 30 min

Everyone goes through a number of stages prior to making a purchase or decision. This is called the buying/decision process. There are five distinct stages to any decision process (as seen through the client's operating reality) starting with (1) identify need, then (2) investigate options, (3) resolving concerns, (4) purchase/decision, and the final stage is to (5) implement the decision to use the selected option. Understanding how a decision is made is not enough. You need to be able to add value at each stage of the process. This module covers how to add value at every stage of the decision process.

Buying/Decision Process - Introduction
Lesson 1: Identifying the Need
Lesson 2: Investigating the Options
Lesson 3: Resolving Concerns
Lesson 4: Purchasing/Decision and Implementing
Key Learning - Buying/Decision Process

SE105 - *Communicating Value* 20 min

A Value Proposition is your business or marketing statement that summarizes why a client or prospect should buy from you. This statement should convince a potential buyer that your particular product or service will add more value or better solve a problem than other similar offerings. The ideal value proposition is concise and appeals to the buyer's strongest decision-making drivers. This course provides a simple to understand, three-part formula for building value propositions that Captivate, Differentiate and Validate your solutions.

Communicating Value - Introduction
Lesson 1 - Components of a Value Proposition
Lesson 2 - Signs of a Weak Value Statement -
Lesson 3 - Benefits of a Strong Value Statement
Key Learning - Communicating Value

SE106 - Targeted Messaging

45 min

The way a client need or problem is perceived is often dependent on where a contact “sits” within their organization. It’s not only what they are exposed to and have actually experienced, it’s how what’s happening impacts the things that they care about or are responsible for. One of the big mistakes that sales people make is failing to put their solution into language that is meaningful to the buyer. The solution may indeed be exactly what the client needs, but by failing to tie it to their operating reality makes it hard for the buyer to see the value. This module shows how to target your messages to what likely matters the most to them.

Targeted Messaging - Introduction

Lesson 1: Buyer Personas

Lesson 2: Uncovering Persona Drivers

Lesson 3: Determining Top of Mind Problem and Choosing and Offering

Lesson 4: Creating Messages Aligned to What Matters Most

Key Learning - Targeted Messaging

AM114 – Identifying Account Growth Opportunities

60 min

The key to expansion is finding new ways to add value to earn your customer’s business every day. Do this and you will block the competition out, increasing retention. You will also increase revenue, strengthen relationships, and create strategic partnerships.

Identifying Account Growth Opportunities – Introduction

Lesson 1: Retention and Expansion

Lesson 2: Driving Growth through Cross-Selling

Lesson 3: Proactive Measures

Key Learning – Identifying Account Growth Opportunities

SE107 – Prospecting & Social Selling

90 min

Successful prospecting requires skills in a variety of methods including email, over the phone, social media, networking and even text messaging. Every time you reach out to a prospect you are leaving an impression and have the opportunity to build your brand and provide insight about you, your organization, and how they will benefit from working with you. Gain useful techniques to stand out among the competition. Learn to craft attention-getting emails prospects will open and read. Leave voicemails that get call backs and use a three-step process to secure more appointments!

Prospecting & Social Selling - Introduction
Lesson 1: The Importance of Prospecting
Lesson 2: Building Your Online Brand
Lesson 3: Prospecting with Emails and Texts
Lesson 4: Prospecting Over the Phone
Lesson 5: Leaving an Effective Voicemail
Key Learning – Prospecting & Social Selling

AM115 – Planning Compelling Client Meetings

45 min

Every client interaction is a moment of truth, an opportunity to show the value of partnering with you and your organization. Regardless of your experience, meetings must be planned. In this module, we share how to extend meeting invitations which compel the client to meet and lay out a process of meeting preparation to achieve your goals and advance the decision process.

Planning Compelling Client Meetings - Introduction
Lesson 1: Starting Your Plan
Lesson 2: Defining Your Goals
Lesson 3: Communicating Value
Key Learning - Planning Compelling Client Meetings

SE108 - Effective Questioning

45 min

Experienced salespeople know that questioning is like peeling an onion – there are layers that need to be stripped off to get to a client or prospects real needs. You can suspect a few things about a client and their needs, but, until you engage in a fact-finding conversation, you are really making an educated guess. Understanding how to uncover pain, create gap and get your buyer to identify with your solution takes effective questioning skills. This course explains the 4 types of questions for sales communication using the acronym SIGN. **S**ituation, **I**nsight, **G**ap, and **N**eeds **S**olution questions. Master these and your sales will soar!

Effective Questioning - Introduction
Lesson 1: Looking for SIGNs
Lesson 2: SIGN Questions
Lesson 3: Situation Questions
Lesson 4: Insight Questions
Lesson 5: Gap Questions
Lesson 6: Need-Solution Questions
Key Learning - Effective Questioning

SE109 - Overcoming Objections

45 min

Objections are difficult to overcome when you take the objection as a personal rejection of you or your proposed solution. To be effective in overcoming objections, you must understand that it is merely a request for more information. An objection is a signal that the client gives you that he or she has concerns that must be addressed at that point in the buying/decision process. It can be caused by a totally unrelated problem such as work pressures, interruptions, or previous bad experiences with other companies. An objection means the buyer cares enough about you and the sale to want to explore it with you. They're telling you about a concern they have, in the hopes you'll help them resolve it. Your enemy is not the buyer; your enemy is disengagement. And an objection demonstrates that the buyer is still engaged. This module addresses the most common objections and gives you a four-step process to overcome every objection and advance the sale.

Overcoming Objections - Introduction
Lesson 1: Why Objections Occur
Lesson 2: Managing Objections with LAER
Lesson 3: Common Objections
Key Learning - Overcoming Objections

AM116 – Leading Successful Quarterly Business Reviews 60 min

Quarterly Business Reviews are absolutely essential to achieving partnership status with the customer and yet they are often overlooked. Our framework for conducting QBRs, the most important client meetings for retention and growth, includes follow-up action critical to the success of account management.

Leading Successful Quarterly Business Reviews - Introduction

Lesson 1: The Most Important Meeting

Lesson 2: Steps for Success

Lesson 3: Components of a Great QBR

Lesson 4: Post-Meeting Action

Key Learning - Leading Successful Quarterly Business Reviews

AM170 – Tying it All Together 45 min

After completing each of the earlier courses covering Account Management best practices, this module ties together each component in a full account plan, reviews key learnings from each section and includes a Final test of Account Management to ensure you are working on the right things every day to advance relationships and help solve customer problems.

Tying it All Together – Introduction

Lesson 1: Account Management Basics

Lesson 2: Your Turn

Key Learning and Final Test