ELEARNING

COURSE OUTLINE

ACCOUNT MANAGEMENT

AM010 – Account Management Introduction and Guidelines 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 system of reinforcing activities to drive account retention and growth.

Account Management Introduction

AM101 - The Four Cornerstones of Success® 60 min

Attitude, Personal Accountability, Perseverance and Habit are the cornerstones of 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: Being in Your Client's Operating Reality
Lesson 2: Assessing Relationships
Lesson 3: People Reading
Lesson 4: Relationship Mapping
Lesson 5: Expanding Your Web of Influence
Key Learning – Developing Strong Relationships

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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 Client's Decision Process 30 min

Everyone goes through several stages before 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.

The Client's 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 – The Client's Decision Process

AM105 - Creating Value and Messaging 45 min

In today's competitive landscape, the ability to communicate value is paramount for account management success. Using a structured approach, learners will explore how to uncover what matters most to the client and align their solutions and messaging. Gain the ability to effectively communicate the unique value of your offerings through a variety of channels to drive deeper engagement, seize growth opportunities, and foster long-term client loyalty.

Creating Value and Messaging - Introduction
Lesson 1: Targeted Messaging
Lesson 2: Communicating Value
Lesson 3: Expanding within Your Accounts
Key Learning – Creating Value and 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

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 that 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 Goals
Lesson 3: Communicating Value
Key Learning - Planning Compelling Client Meetings

AM116 – Leading Successful Quarterly Business Reviews 60 min

Quarterly Business Reviews are essential to achieving partnership status with the customer, 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 course ties together each component in preparation of meaningful client meetings, reviews key learnings from each section and includes a final test of Account Management to ensure you are working on the right things each 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