

ACCOUNT MANAGEMENT

Driving Retention & Growth

Cultivating client relationships and identifying organic opportunities are essential for sustainable growth. Learn how to plan, manage, and apply value-driven account management strategies.



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Module 1

Introduction to Account Management

Proactively managing and prioritising customer relationships is vital for organisational success. Effective account management strategies foster core customer retention and organic growth.

In this module, you will:

1. Define account management and its significance in sales.
2. Explore the key roles and responsibilities of account managers.
3. Examine different account management models and contact strategies.
4. Review the 7 critical competencies in account management.

Module 2

Renewal Management

Effective renewal management is vital for long-term growth and success. It demands various sales skills and competencies as a crucial aspect of account management. In this module, you will:

1. Learn about renewal management and its role in the sales process.
2. Identify why renewal management matters in sales.
3. Review ways to manage the contract renewal process.
4. Examine what to do with non-renewals.

Module 4

Introduction to Communication for Sales

Effective communication is a common trait of influential leaders, successful businesspeople, and effective change agents.

In this module, you will:

1. Examine effective communication's importance in sales.
2. Identify effective communication methods for internal and external stakeholders.
3. Discover the 7C's of communication's relevance in sales.
4. Learn to recognise and adapt to 5 communication styles.
5. Explore effective communication with introverts and extroverts.

Module 3

Upselling and Cross-selling

For account managers, upselling and cross-selling are proactive techniques that help to strengthen the client relationship, create growth opportunities, and increase overall revenue.

In this module, you will:

1. Define upsell and cross-sell opportunities.
2. Identify common models for upselling and cross-selling.
3. Explore the upselling and cross-selling significance in account management.
4. Evaluate effective management of these processes.

Module 5

Relationship Building in Sales

Professional relationships in business and sales are built on mutual trust, respect, and support. Nurturing these relationships fosters idea-sharing, iteration, and opportunity creation.

In this module, you will:

1. Explore why relationships matter in sales.
2. Discuss common types of business relationships.
3. Illustrate long-term relationship building with trust as a key element.
4. Review the compounding effect in business relationships.
5. Identify the steps in managing relationships after a handover.

Module 6

Account Management Planning

The essence of account management planning is relationship strategy development. Account planning supports revenue generation and can provide a competitive edge in the market.

In this module, you will:

1. Discuss the importance of account management planning.
2. Illustrate how to calculate an account's potential.
3. Develop a retention and growth-focused account management plan.

Module 7

Collaborative Selling

Selling is becoming more of a team sport. This module explores effective collaborators' essential skills and qualities in group dynamics.

In this module, you will:

1. Explore what collaborative selling is, and its growing importance.
2. Identify the characteristics of an effective collaborator.
3. Enhance your collaborative selling skills.

Results and Performance Focused

In sales, achieving results is key. This module delves into setting goals, monitoring progress, adapting, and considering various factors to achieve the desired outcome.

In this module, you will:

1. Understand the significance of being results and performance-focused in sales.
2. Explore the traits and actions of a results-driven salesperson.
3. Uncover how to be results and performance-focused.

Module 9

Analytical and Critical Thinking in Sales

These skills, valued by both sales organisations and clients, help understand and address client needs, drive sales, and build long-term relationships.

In this module, you will:

1. Explore the significance of analytical and critical thinking in sales.
2. Learn how to develop analytical and critical thinking skills.
3. Overcome common problem-solving obstacles.
4. Apply the cause-and-effect model for effective sales problem-solving.
5. Discover the impact of bias, and how to manage it.

Module 10

Always Be Learning

To thrive in modern sales, salespeople must go beyond persuasive or emotive psychological tactics. Shift your focus from 'always be closing' to 'always be learning' for long-term success.

In this module, you will:

1. Explore the concepts and benefits of continuous development and learning.
2. Evaluate the role of continuous learning in long-term sales success.
3. Discover the different learning styles and their impact on your habits.
4. Identify 7 steps for effective learning and overcoming challenges.