

**pax8**Academy

# **SKILLS FOR EFFECTIVE ACCOUNT MANAGEMENT**

Syllabus

Updated: March 2025

## Training Overview

This comprehensive training *Skills for Effective Account Management* of four 1-hour sessions is designed to equip participants with the essential skills and knowledge required for effective account management and strategic communication. Through a blend of theoretical insights and practical applications, participants will learn to build strong, trust-based relationships with Managed Service Providers (MSPs) and business owners, enhancing their ability to provide proactive and relational care.

By the end of this course, participants will be equipped with the tools and techniques to excel in account management, communicate effectively, and build strategic relationships with business owners, ultimately driving business success.

Target Audience: Account Managers, Technical Account Managers, Strategic Technology Advisors

## What You'll Get

- 4 hours of virtual, interactive, instructor-led content by an MSP-industry expert
- Downloadable videos\* of the content you can rewatch on-demand at your convenience
- Downloadable slide decks, handouts, and resources

## Learning Objectives

By attending this course, you will:

- Embrace Account Management as a key role in providing MSP proactive and relational care and understand the key elements of building trust, building value, and providing strategic support.
- Elevate your communication skills by exploring various communication types and learning to effectively use different communication tools.
- Gain a deeper understanding of business owners by discovering their real priorities and have the right discussions to build a strong strategic relationship.

\* Videos will either be recordings from your session or previously recorded material in which partner faces and voices have been removed. It is recommended to attend courses live to receive the full benefits of interactive Q&A with the instructor and class.

## Schedule of Topics

- Session 1: Driving proactive, relational care
  - Juggling the Account Management priorities
  - Being an ambassador for client satisfaction
  - Doing our part for successful support
- Session 2: Think like a business owner
  - Common pain points and needs of varying growth stages
  - What are owners really asking?
  - Understanding the Client Lifecycle
- Session 3: Master Communicator
  - Building trust and relationships
  - Techniques for technology needs
  - Through meeting management
- Session 4: Value through strategic conversations
  - Invest into client strategy conversations with the right questions
  - Put Strategic Plan into action
  - Managing strategic initiatives

## Instructor



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Partner Education Specialist

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## Next Steps

Explore your next step with Pax8 Academy:

- On Demand
  - [Driving Success Together: The Vital Role of Quarterly Business Reviews](#)
  - [Uncovering Prospect Needs](#)
  - [Articulating your Value and Differentiation](#)
  - [Tips for Efficient and Effective Meetings](#)
- Instructor-Led Training
  - [Account Management](#)
  - [Operations for Efficiency and Profitability](#)
  - [Results Selling Framework](#)
- Peer Groups
  - Collaborate with an [Account Manager Peer Group](#)
- Coaching
  - Transform your business with [Operations Coaching](#)

**Register for this course through the Instructor-Led Training Subscription**

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