Academy

ACCOUNT MANAGEMENT

Syllabus

Updated: April 2025

Training Overview

What is Account Management? Why should you be concerned about it, and how can you do it effectively?

Account Management has often been seen as a sales position to ensure a healthy pipeline or a necessary means to encourage clients toward stack alignment. It can also be perceived as the role that manages client escalations or the main point of contact for all client needs.

This training will help you evaluate all areas of Account Management for your business. Participants will learn how Account Management can be modeled based on current company size and structure, as well as ways it can be utilized to nurture mutually beneficial relationships with clients. This training is intended for MSPs of all sizes with a goal of striving to become a trusted partner who propels their clients' success.

Participants will gain insights into how effective Account Management enables them to become a strategic partner to their clients and develop long-lasting, profitable relationships.

This training is designed for:

- **MSP owners**
- **Account Manager**
- **Operations Managers**

Training Inclusions

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

Learning Objectives

Participants in this training will learn how to:

- **Understand the impact of Account Management on success for their clients and their companies**
- **Understand the structural tools needed to set up a successful Account Management plan**
- **Utilize Account Management to transform from a vendor into a trusted, strategic partner**

* 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 trainings live to receive the full benefits of interactive Q&A with the instructor and class participants.

Training Topics

Session 1: Understanding Account Management

- **Strategy of Account Management**
- **Pillars of Account Management**
- **Scaling with your business**

Session 2: Understanding Your Client

- **What do you need to know about your client?**
- **What does your client want from you?**
- **How to meet your clients where they are**
- **How and what to learn from your clients**

Session 3: Formalizing Client Management

- **Understanding different Account Management interactions**
- **Creating a playbook for your Account Management team**
- **Metrics and reports to evaluate within Account Management**
- **Account Management Key Performance Indicators**

Session 4: Transforming Customer Experience

- **Optimizing client feedback**
- **Understanding your company's ideal client**
- **Enhancing your ideal client experience**

Meet the Instructor

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- **Peer Groups**
  - Collaborate with an Account Manager Peer Group
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Additional Resources

Consider reporting your newly organized financial data to Service Leadership.

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