

# The Account Manager's Playbook

How to Increase Sales,  
Serve Customers Better,  
& Work Less



## What's Inside:

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### Managing Time

Structure your schedule; devote proper time to sales and customer or client service.

2

### Serving Your Customers

Provide exceptional customer experiences while keeping peace of mind.

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### The Account Management Dashboard

Build a tool belt for winning more business and improving your customer service process.

4

### The Sales Process

Close more deals by asking tough questions.

## What's Inside:

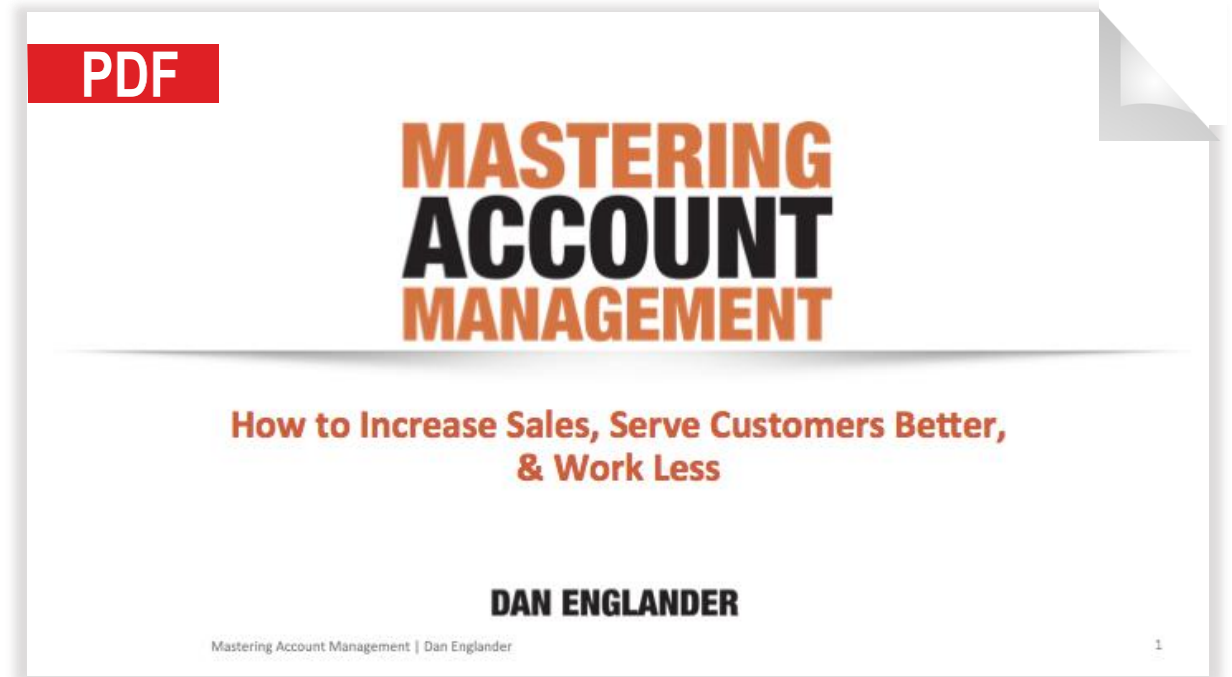
**5** **Responding to Objections**  
Overcome objections and explore all business opportunities.

**6** **Tips & Tools**  
Gadget and general strategies for improvement.

**7** **Farming**  
Generate long-term repeat business with your existing customers.

**8** **Additional Resources**  
Take your account management education to the next level.

Wait One Sec!  
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Presentation?  
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# About Me

**Dan Englander (@DansPalace)**

**Founder of Sales Schema,**

a site devoted to helping professionals find the right balance between sales and customer service.

**Instructor, The B2B Sales Blueprint,**

a comprehensive course for B2B salespeople.

**Previously,**

Dan was the first employee and Senior Account Manager at IdeaRocket, a New York-based animation studio for businesses.



**DAN ENGLANDER**

**MASTERING  
ACCOUNT  
MANAGEMENT**



## Managing Time

To be a successful account manager, you must exceed customer expectations, generate new business, and manage your team (among other things). Sounds scary? Don't worry!

This section will give you the right framework for creating a schedule and managing your time.

## Separate Client Service & Sales

**Give each undertaking the time it deserves.**

Sales must be a continuous daily effort to produce results.

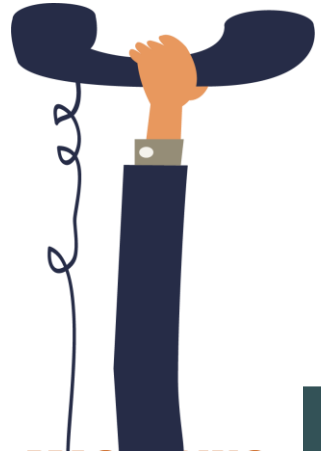
**Create 2-3 Overarching Missions**

For example:  
“meet client needs” & “generate new business.”

Hop between tasks to stay motivated, but focus on one mission at a time.



## Batch Your Tasks



### Administrative Task

Don't complete annoying admin tasks immediately.

Stack them up and knock them down.



### Limit Phone & Email

Use apps like InboxPause to limit incoming distractions.





# Serving Your Customers

Learn to understand and exceed customer expectations while keeping your peace of mind.



## Serving Your Customers



### Value Customer Experience Over Final Output

Your customers will remember your service more vividly than they will the quality of the completed product.

### Understand the Personal & Political

Ask questions to reveal your customer's personal and organizational challenges and desires.

# Serving Your Customers

## Extinguish Fires

When customers have a problem, offer additional options, keep a cool head, and move forward.

Start a “foibles list” to prevent recurrences.

## Question Deadlines

Will your customers have deadlines? Yes. Should you always do what you can to meet them? Of course. Do you have the right to question them? Absolutely.



# The Account Management Dashboard

This is the machinery you need to make strangers into customers, and customers into happy, long-term customers.

Psst... [The Book](#) will give you access to spreadsheet templates and other tools.





# The Account Management Dashboard

## Target List & Pipeline

Keep track of your leads and forecast future sales.

## Project Management Tools

Build a consistent process for all engagements.

Use Asana or another tool to create a blueprint for each project.

## Farming Spreadsheet

Keep track of new opportunities with your existing customers.



# The Sales Process

Regardless of whether your day-to-day involves working to close new business, developing a sales mindset will make you a stronger account manager.

Sales skills will help you in all sorts of personal and professional situations.



## The Sales Process



### Understand Problems

Ask questions that reveal your prospect's challenges.

Focus on previous experience, personal, and organizational issues.

### Uncover Target ROI → Reveal Actual Budget

Find budget by pinpointing what your prospect wants to gain from your offering.

If they're having trouble, give hypothetical goals.

# The Sales Process



## Make Your Pitch

Keep it quick and punchy. Focus on why you do what you do, what makes you different, and why this difference is important.



## Land a Follow-Up Appointment

Over 80% of lost deals are lost due to lack of follow-up (source: Robert Clay).

Make sure to get a mutually-confirmed next step before you hang up the phone.



## Close by Defining What Closing Entails

When the time comes, make it clear what your prospect must do to become a customer.



# Responding to Objections

When objections arise, take the pressure off and explore all opportunities to make the engagement work.

If you have to, admit that you might not be the right fit. Become a consultant instead of salesperson, and get back on track.



## Responding to Objections

### Face Competitors Head-On

Encourage your prospect to stack you up against your competitors.

Provide comparison tools that accentuate your strengths.

### Explore All Budget Options

Present your price loosely, and keep the conversation open.

If you get a price objection, ask what your prospect is aiming for.



## Responding to Objections



### Use Delays to Create Urgency

If your prospect delays, find out if it's legit or a polite way of saying "no". If the former, provide a timeline detailing your process, and set follow-up appointments.

### Learn from Losing

For every deal you win, you must lose a certain number. Losing is simply an investment in future business.

Learn from the experience and pinpoint areas for improvement.

## Tips & Tools

Here are general strategies and gadgets for becoming a better, faster, and stronger account manager.



## Tips and Tools

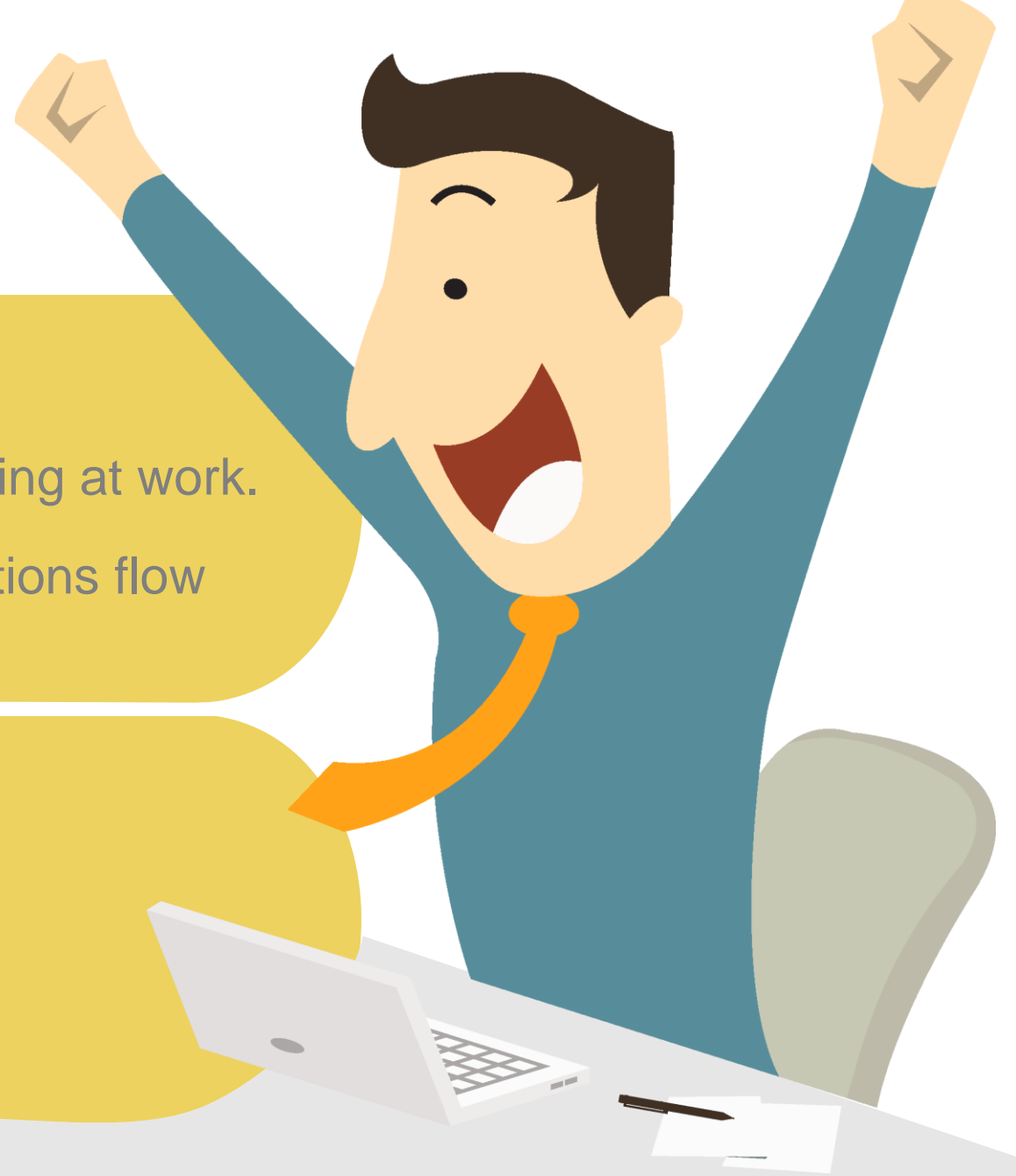
### Get Warmed Up

Get on a sales call within five minutes of arriving at work.

This will make the rest of your daily conversations flow smoothly and naturally.

### Try a Standing Desk

It will help you speak more clearly, you'll project more confidence on sales calls. Plus, you'll be healthier.



## Tips and Tools

### Timelines

Set and exceed customer expectations, and bring prospects into your sales cycle by providing a timeline.

Make creation easy with tools like **Tom's Planner**.

### Use Visuals

Your pitch is competing for your audience's memory.

Be memorable with the help of visuals like Prezi, video segments, and info-graphics.



## Farming

You're 40-55% more likely to win business with an existing customer than with a new prospect. Create a repeatable farming process and it will pay major, long-term dividends.



## Farming

### Conduct a Debrief Call

At the end of every engagement, get honest feedback from your customers.

Learn about future opportunities.

### Ask for Referrals

Be specific and make them convenient for your customers.

Provide an email template they can use for introductions.





## Farming

### Provide a Take-Home Guide

Offer materials from which your customers will gain continuous value.

They'll be more likely to circle back to you.

### Network with Your Customers

Bringing your customers into your network will strengthen your relationship.

Find out what types of professionals they will benefit from meeting, and connect them.



## Additional Resources

### Mastering Account Management

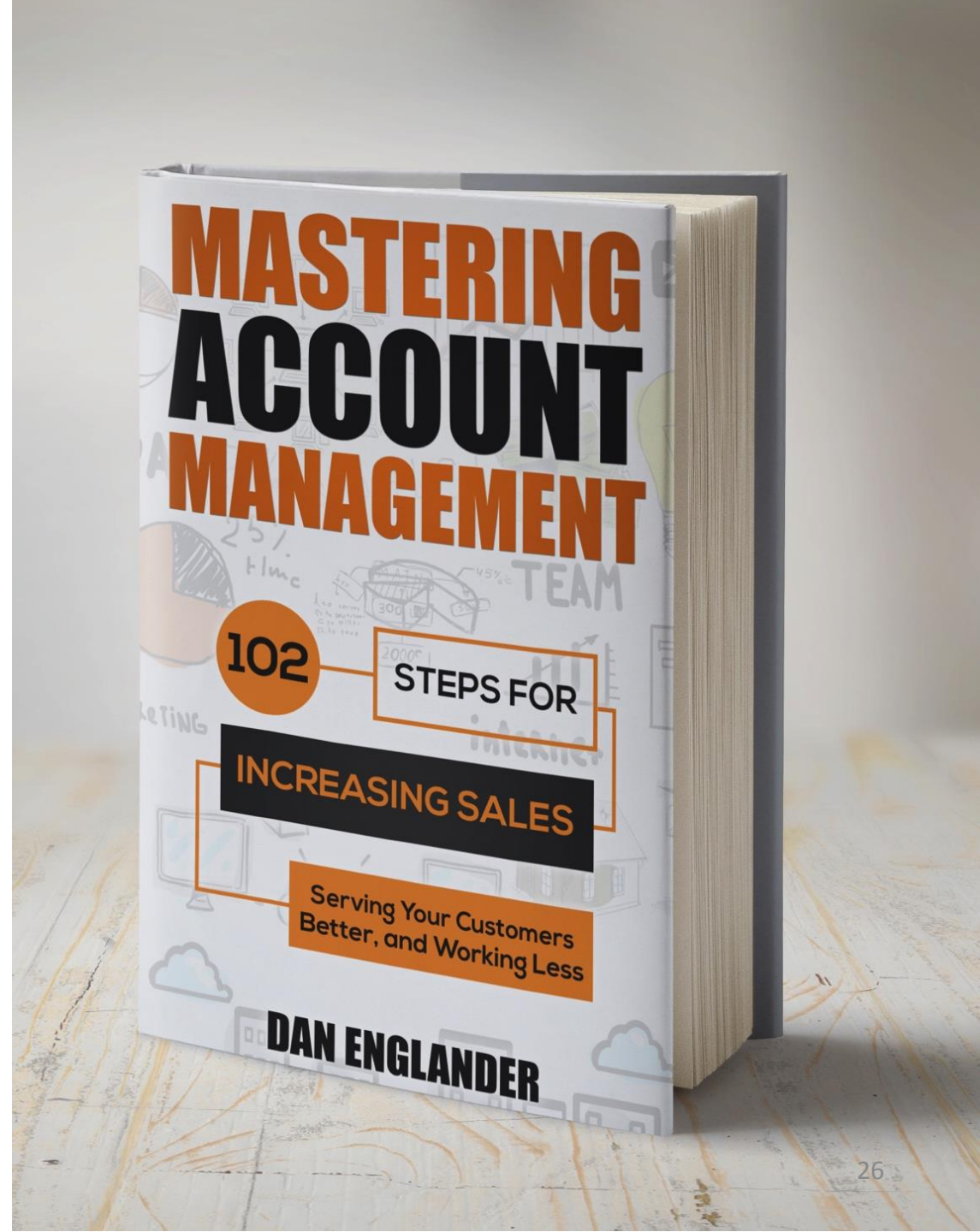
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MANAGEMENT**



**Thanks for Learning!**

