



ULTIMATE Account Management Online Workshop

➤ Overview

This workshop is designed to greatly enhance the effectiveness of anyone involved with Account Management, sales, customer service, or sales support. The Account Manager is one of the most critical positions in any service business but often takes a back seat to other functional areas. Join us to discover what it takes to be a successful Account Manager – an ULTIMATE Account Manager – along with specific steps to improve account management processes in your business.

Prior attendees have commented that this workshop was one of the best they have ever attended due to the critical nature of the topic, wealth of resources presented, key takeaways discovered, and learning which occurs in a collaborative workshop environment.

➤ Format

- 12 online sessions held weekly
- 3 semesters held per year
- Contact us for specific semester start dates and session times
- Sessions utilize GoToMeeting/GoToWebinar technology
- Sessions are 45—60 minutes in length
- Each session includes a mix of education, discussion, and accountability
- Key takeaways are documented at each step to encourage application
- Program materials are provided electronically for your convenience

➤ Meet Your Facilitator



Dana Davis brings over 30 years of Green Industry experience focused on sales and customer service. He is a Certified Arborist with the International Society of Arboriculture and holds a B.A. degree in Horticulture and Applied Biology.

His areas of expertise include: starting new service lines, upselling and cross selling while having excellent customer retention rates. He has worked with both large national companies as well as large regional firms. Dana has focused on commercial sales, residential sales, and new market startups.

▶ Session Topics

- ▶ Account Management Definition
- ▶ ULTIMATE Account Management Fitness & Attribute Rating System
- ▶ Customer Relationships
- ▶ CRM Programs
- ▶ Customer Interactions
- ▶ Managing Customer Expectations
- ▶ A Day in the Life – workshop exercise
- ▶ Account Management Assignments Overload
- ▶ Project / OPS Management
- ▶ Account Management & Sales
- ▶ Selling Renewals
- ▶ Selling Enhancements

▶ Who Should Attend

- ▶ Account Managers and managers of Account Managers
- ▶ Less seasoned, and especially newly promoted Account Managers, will gain an enormous amount of information and develop their skills significantly
- ▶ More seasoned Account Managers will gain new insights and be challenged to increase the effectiveness
- ▶ Owners and/or senior managers may wish to attend as a show of support and to further develop their own effectiveness with their account management

▶ Investment

- ▶ \$600.00 for the entire workshop – all 12 sessions and program materials
- ▶ No limit to the number of people from your organization to participate on your end at no additional cost – have your entire team watch and listen from your conference room

▶ Top Reasons to Attend

- ▶ Account management is often neglected – overshadowed by the need for new business development (proactive selling) and operations
- ▶ Discover what it takes to become an ULTIMATE Account Manager and how to get there
- ▶ Focused on the green industry with industry-specific discussions
- ▶ Network with other industry leaders, including **Dana Davis**. Iron sharpens iron.

➤ Contact Us

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