



Consulting and Training | Reach New Heights

Course Name

Financial Acumen for Sales Professionals

Sector Name

Sales, Marketing and Customer Service

Document Type

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Financial Acumen for Sales Professionals

Course Introduction

Understanding the financial side of sales is key to making smarter decisions, improving profitability, and adding value to your clients and organization.

This program equips sales professionals with practical financial skills to interpret business metrics, assess revenue and profit impact, and make data-informed decisions in their daily sales activities.

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Target Audience

- ✓ Sales Representatives/Executives
- ✓ Account Managers
- ✓ Sales Managers
- ✓ Business Development Managers
- ✓ Sales Directors
- ✓ Customer Success Managers

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Learning Objectives

- ✓ Understand basic financial statements and key business metrics.
- ✓ Evaluate the profitability of products, deals, and clients.
- ✓ Make pricing, discounting, and upselling decisions informed by financial impact.
- ✓ Communicate financial insights confidently with clients and colleagues.
- ✓ Use financial knowledge to contribute to personal and team sales performance.

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Financial Acumen for Sales Professionals

Course Outline

✓ DAY 01

Introduction to Financial Acumen in Sales

- ✓ Understanding income statements, balance sheets, and cash flow at a high level
- ✓ Key metrics: revenue, cost, margin, and profit
- ✓ How sales activities affect financial outcomes
- ✓ Real-world examples of financial impact in sales

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Course Outline

✓ Day 02

Evaluating Deals and Customers

- ✓ Assessing deal profitability and contribution to revenue
- ✓ Understanding product margins and cost drivers
- ✓ Identifying high-value clients and opportunities
- ✓ Financial considerations in pricing and discounting decisions

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Course Outline

✓ Day 03

Using Financial Data to Drive Sales Decisions

- ✓ Tools for analyzing sales and revenue data
- ✓ Forecasting personal sales outcomes and target achievement
- ✓ Recognizing trends and patterns in sales performance
- ✓ Making informed choices on upselling, bundling, and cross-selling

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Financial Acumen for Sales Professionals

Course Outline

✓ Day 04

Communicating Value with Financial Insight

- ✓ Explaining pricing, ROI, and financial benefits to clients
- ✓ Presenting data clearly and confidently to colleagues and managers
- ✓ Negotiation tips informed by financial understanding
- ✓ Avoiding common mistakes in interpreting financial data

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Financial Acumen for Sales Professionals

Course Outline

✓ Day 05

Applying Financial Acumen in Everyday Sales

- ✓ Integrating financial awareness into daily sales workflow
- ✓ Tracking personal performance with key financial indicators
- ✓ Making smarter decisions to optimize revenue and margins
- ✓ Creating a personal plan to continue improving financial skills

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Confirmed Sessions

FROM	TO	DURATION	FEES	LOCATION
May 17, 2026	May 21, 2026	5 days	2150.00 \$	Virtual , Online
Nov. 1, 2026	Nov. 5, 2026	5 days	4250.00 \$	KSA , Riyadh
April 5, 2027	April 9, 2027	5 days	4950.00 \$	Turkey , Istanbul
Aug. 10, 2026	Aug. 14, 2026	5 days	4250.00 \$	UAE , Dubai

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