



Consulting and Training | Reach New Heights

Course Name

Mastering Proactive Account Management

Sector Name

Sales, Marketing and Customer Service

Document Type

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Mastering Proactive Account Management

Course Introduction

Top-performing sales professionals don't just react—they anticipate. Proactive account management enables sales teams to foresee client needs, prevent issues before they arise, and create long-term value.

This advanced program equips participants with the skills and tools to monitor accounts strategically, anticipate client priorities, and implement proactive actions that strengthen relationships, increase satisfaction, and drive sustainable growth. Participants will learn to transform account management from reactive problem-solving to forward-looking value creation.

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Mastering Proactive Account Management

Target Audience

- ✓ Account Managers
- ✓ Client Success Managers
- ✓ Sales Representatives/Executives
- ✓ Customer Relationship Managers
- ✓ Business Development Managers:

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Mastering Proactive Account Management

Learning Objectives

- ✓ Apply proactive account management techniques to anticipate client needs.
- ✓ Monitor account health using advanced metrics and insights.
- ✓ Identify opportunities for value creation before clients request solutions.
- ✓ Strengthen client relationships through trust, foresight, and timely action.
- ✓ Align account activities with business goals and long-term client success.
- ✓ Implement a structured approach to continuous account improvement.

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Mastering Proactive Account Management

Course Outline

✓ DAY 01

Foundations of Proactive Account Management

- ✓ Understanding the difference between reactive and proactive account management
- ✓ Key principles and benefits of proactive account management
- ✓ Mapping account structure, stakeholders, and influence networks
- ✓ Evaluating account health and performance indicators
- ✓ Setting objectives for proactive engagement

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Mastering Proactive Account Management

Course Outline

✓ Day 02

Anticipating Client Needs

- ✓ Techniques for understanding client business priorities and challenges
- ✓ Gathering actionable insights from account data and market trends
- ✓ Identifying early indicators of client needs and potential risks
- ✓ Predictive approaches for spotting opportunities before competitors
- ✓ Structuring an early-warning system for account issues

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Mastering Proactive Account Management

Course Outline

✓ Day 03

Planning and Prioritizing Proactive Actions

- ✓ Creating actionable account plans with proactive initiatives
- ✓ Prioritizing activities based on impact and urgency
- ✓ Aligning proactive strategies with business goals and KPIs
- ✓ Leveraging cross-functional support to implement plans
- ✓ Designing interventions to increase client satisfaction and retention

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Mastering Proactive Account Management

Course Outline

✓ Day 04

Engaging Stakeholders Proactively

- ✓ Communicating value and foresight to clients
- ✓ Building trust and credibility through anticipatory actions
- ✓ Engaging internal teams to address client needs before they arise
- ✓ Negotiation and influence strategies for proactive account management
- ✓ Managing conflicts or objections with a forward-looking approach

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Course Outline

✓ Day 05

Monitoring, Evaluating, and Optimizing Account Management

- ✓ Tracking proactive initiatives with dashboards and KPIs
- ✓ Evaluating outcomes and lessons learned
- ✓ Continuous improvement of account management strategies
- ✓ Scaling proactive practices across multiple accounts

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Confirmed Sessions

FROM	TO	DURATION	FEES	LOCATION
Nov. 8, 2026	Nov. 12, 2026	5 days	4250.00 \$	KSA , Riyadh
April 5, 2027	April 9, 2027	5 days	4250.00 \$	UAE , Dubai
Aug. 10, 2026	Aug. 14, 2026	5 days	4950.00 \$	USA , Texas
April 26, 2026	April 30, 2026	5 days	2150.00 \$	Virtual , Online

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