HORAE GROUP
it's about people.

Account Categorization & Analysis

This course covers the most essential techniques, materials, and tools needed to help redirect the client in regards to the process of categorizing and analyzing their clients.

AUDIENCE

Sales managers/ leaders

VALUE

Immediate improvement in the sales team's performance

Attracting the right segment

Gain a comprehensive understanding of clients

Rely on data-based solutions during decision-making

OBJECTIVES

- Optimizing sales efforts to long-term client relationships
- Using detailed methods for better segmentation and client profiling
- Highlighting the concept of account categorization
- Creating personalized sales approaches

CONTENT

Process of classifying clients

- Advanced strategies for managing potential accounts
- Have a well-prepared criteria
- Create customer personas

Process of classifying existing accounts

- Through demographics, psychographics, geographics
- Track management efforts of the sales team
- Prioritize clients with high revenue potential

Analysis of existing accounts and potential clients
- Focus the efforts on high-priority accounts
- address the unique and challenging points of the clients

Using advanced analytical tools and technology
- Sales analytics software
- Using CRM software
- Accurate data management techniques

METHODOLOGY

- Interactive Lectures
- Group Discussions
- Role-Playing Exercises
- Case Studies
- Hands-On Activities
- Feedback and Inquiry

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2 DAYS