



# ACCOUNT MANAGER TRAINING COURSE

## Lesson Outline

**Introduction video:** How to use the Harvest Learning Center

### Module 1 - Selling Enhancements

1. Selling Enhancements Introduction
2. What Are Enhancements?
3. Why do enhancements?
4. How Do You Measure Success?
5. What Are The Two Types Of Enhancements?
6. How Do I Identify Enhancement Opportunities?
7. How To Prioritize Enhancements
8. How To Build A Long Term Enhancement Plans
9. Know Your Best Plant Choices
10. Presentations & Proposals
11. Important Sales Techniques - Part#1
12. Important Sales Techniques - Part#2
13. Agreements & Approvals - Part#1
14. Agreements & Approvals - Part#2
15. Sales Tips
16. Sales Techniques & Lessons Learned
17. Know The Most Common Objections
18. Techniques On How To Close The Sale
19. Beware Of Closing Too Soon
20. The Hand-Off To Field Operations For Execution
21. The Enhancement Sales Game Plan

### Module 2 - Pricing & Estimating Enhancements

1. Pricing & Estimating Enhancement Jobs Introduction
2. How to Measure a Property and do a proper Take-Off
3. How to read and evaluate plans and specifications
4. Identifying job or site conditions that might give rise to increased costs
5. The two different types of estimating formats Unit Based and Cost-Based

6. Understand the range of pricing strategies and margins for small vs large jobs
7. Knowing when It is better to do certain types of jobs on a Time and Material basis
8. Know your market place... Your Clients do
9. Know when to say NO!
10. Know when to say NO! Part 2
11. Tips, Tactics and Techniques for Estimating and Pricing Enhancements
12. Tips, Tools, & Forms for Estimating and Pricing Landscape Enhancement
13. Preparing the Estimate - TRIANGULATE

### Module 3 - Building & Sustaining Customer Relationships

1. Building & Sustaining Customer Relationships Introduction
2. Where do Your Relationships Stand Now?
3. Where do You Want Your Relationships to Be?
4. Getting off to the Right Start
5. Getting to Know Them
6. Relationship Building Basics Part One
7. Relationship Building Basics Part Two
8. Building Trust
9. Have Them Fall in Like with Us!
10. Communication
11. TouchPoints
12. Relationships in Jeopardy
13. Develop, Open, & Complete Communications
14. Handle Complaints
15. Jobs in Jeopardy
16. Dealing With Unreasonable Clients
17. Relationship Tips & Lessons Learned
18. Building & Sustaining Customer Relationships Closing

## Module 4 - How to Retain & Renew Client Contracts

1. Hot to Retain & Renew Client Contracts Introduction
2. What are renewals? What is retention?
3. How to Calculate Customer Retention
4. Know the Key Ingredients for Success
5. Stand Back and Take a Good Look
6. Setting the Table for the Renewal
7. Review the Agreement/ Contract Verbiage
8. Go for the Enhancements/ Extras!
9. Try for Add On Services
10. Exhaust the Cost Side First
11. Consider the Revenue Side of the Equation
12. Go for the Increase/ Adjustment on the Renewal
13. How To Negotiate & Common Pushbacks
14. Closing The Deal
15. Consider Moving On and Not Holding On
16. Tips, Tactics, & Lessons Learned
17. More Tips, Tactics, & Lessons Learned

## Module 5 - Time Management

1. Time Management Introduction
2. Start with the End in Mind
3. Know your Roles, Goals, High Leverage Activities - Roles
4. Know Your Roles, Goals, High Leverage Activities - Goals
5. Know Your Roles, Goals, High Leverage Activities - High Leverage Activities
6. Where Do You Spend your Time Now?
7. Know the Classic Time Robbers – What to do?
8. Harvest Your Time Tips Part One
9. Harvest Your Time Tips: Part Two
10. Harvest Your Time Tips Part Three
11. Elements of a Good Time Management System Overview
12. Takeaways Making it Work for You!

## Module 6 - Client Conflict

1. Client Conflict Introduction
2. Adjust Your Mindset
3. THE SOUND OF SILENCE
4. Listen & Pay Attention
5. Be Empathetic & Apologize
6. Discover The Cause
7. Preset a Solution
8. A Passion For Service
9. Follow Up!

## 10. Practice Preventing Problems

## 11. Reviewing The Basics

## Module 7 - Quality Counts

1. Quality Counts Introduction
2. What is the Quality Counts Program?
3. How will Quality Counts Help?
4. Why Have a Quality Counts Program?
5. Why is Consistent Quality Important for a Company?
6. Why is Consistent Quality Important for the Customer?
7. Why is Consistent Quality Important for the AM?
8. How do We Learn What the Customer Expects?
9. The Customers' Expectations of Quality
10. How to Conduct a QC Review
11. Level One Expectations of Quality Counts
12. Level Two Expectations of Quality Counts
13. Level Three Expectations of Quality Counts
14. Most Common Quality Counts Mistakes
15. When to use the Quality Counts Program
16. The Quality Counts Takeaways

## Module 8 - Successful Job Walkthroughs

1. Successful Job Walkthroughs Introduction
2. Preparation: Have a Purpose:
3. Preparation: Become Familiar with the Job and Client Status
4. Preparation: Scheduling the Site Inspection/ Walkthrough
5. Preparation: Bring the Necessary Tools to the Walk Through
6. Preparation: Prepare Strategies, Goals and an Agenda
7. Presentation: Be In Charge
8. Presentation: Set the Time and Day to Show the Landscape at It's Best
9. Presentation: Start the Walkthrough
10. Presentation: End of the Walk Through
11. Follow-Up, Follow -Up, Follow -Up
12. Thinking Outside the Box – Using Today's Technology

## Module 9 - Success Behaviors

1. Introduction: What is Behavior and what does it say about you?
2. What are Success Behaviors and why are they important?

3. What is Present – Prepared – Positive?
4. Continuous Learning & Improvement
5. Adapt to Changes, seek and embrace Innovation
6. Respect for Others
7. Team Orientation
8. Execution: Consistent – Timely Delivery
9. Passion – Enthusiasm – Driven – Balanced
10. Integrity: Truthful, Moral, Ethical
11. Problem Solver
12. Have Specific Goals

5. ID the BIG Four: Safety, Security, Liability, Asset Protection
6. Establish a Starting Quality Counts! Score
7. Build a Game Plan for the First 90 days
8. Discover Enhancement Opportunities
9. Tips for Turning Start-Ups into Enhancement Sales
10. New Job Start-Up Review

### Module 10 - Job Exits & Turnovers

1. Job Exits & Job Turnovers Introduction
2. Have a Job in Jeopardy Process
3. Client Driven Exit Turnovers
4. Organizational Driven Exit Turnover
5. Lost Job Autopsy
6. Job Exits / Turnover Process
7. Job Exits / Turnover Tips Tactics and Techniques
8. Module Review

### Module 11 - New Job Start-Ups

1. New Job Start-Ups Introduction
2. The Pre-Job Start-Up Protocol
3. Meet and Greet: Covering the Basics
4. Job Review / Documentation of the Basics

### Module 12 –

1. Introduction: Selling New Jobs to Existing Customers
2. Identifying your Preferred Targeted Customer
3. Know your Targeted Customer
4. Know Your Competitors
5. Know Your Company's Capabilities and Capacity
6. Have Sales Goals & Track Your Progress
7. Make Killer Proposals
8. Presentations
9. Handling Objections
10. Negotiations & Closing the Sale
11. Simple Sales Tips
12. Getting Testimonials
13. Build and Execute Your Sales Game Plan
14. Module Overview and Conclusion

## Tools Included with the Program!

### Module 1 - Selling Enhancements

- Master Enhancement Proposal Template
- Developing a Master Client Enhancement Plan
- Master Client Enhancement Plan
- Service Rotation Work Flow Operations Plan

### Module 2 - Pricing & Estimating Enhancements

- Unit Price Sheet Example
- Customer Budget Worksheet
- Enhancement Proposal Sample Specifications
- Enhancement Estimating Bid Form
- Production Rates, Volumes, Weights, & Measurements

### Module 3 - Building & Sustaining Relationships

- Client Profile
- Client Satisfaction Survey
- Customer Survey Overview

### Module 4 - How to Retain & Renew Client Contracts

- Contract Renew Language
- Renewal Process
- Sample Renewal Letter #1
- Sample Renewal Letter #2
- Sample Renewal Letter #3
- Contract Renewal Checklist
- Sample Scope of Service

## Module 5 - Time Management

- Harvest Your Time
- Time Management Priority Checklist
- Covey Quadrant
- Fred's To Do
- Things To Do List
- The Harvester Recommend

## Module 6 - Client Conflict

- At-Risk Meeting Tracking Template
- Managing Moments of Truth
- The Sound of Silence
- Turning Complaints Into Compliments

## Module 7 - Quality Counts

- QC Program Overview
- QC Sample Roll Out Agenda
- QC Criteria Standards
- QC Managers Guide
- QC Score sheet
- QC Score Sheet - Short Form
- QC Action Items
- QC 3 Levels of Quality
- QC Rewards & Recognition Program
- QC Spreadsheet
- QC Improvement Techniques

## Module 8 - Successful Job Walkthroughs

- Job Walkthrough

## Module 9 - Success Behaviors

- Ten Ways To Practice Good Customer Service
- How To Be Equipped For Service
- Keep A "To Be" List
- Serving Internal Clients
- Account Manager Training Grow Card

## Module 10 - Job Exits & Turnovers

- Canceled Job Survey
- Lost Job Autopsy
- Termination Letter
- Focus Group Questions for Managers
- Focus Group Questions

## Module 11 - New Job Start-Ups

- New Job Start-Up Checklist
- 30-60-90 Day Plan
- Job Site Safety Assessment