freshworks

10 tips to level up your account management

Tip: Empathize with your clients

Explanation: Don't just be focused on making the sale—help your customers by understanding their goals, challenges, and pain points.

Tip: Define your key accounts

Explanation: Decide which accounts have the best fit and highest growth potential, and allocate resources accordingly.

Tip: Profile accounts and put them into tiers

Explanation: Create several tiers of priority with different account management plans reflecting performance expectations.

Tip: Personalize your communication

Explanation: Keep track of and use customer information so you can deliver the most relevant updates for their needs.

Tip: Build long-term relationships

Explanation: The Pareto Principle says 80% of revenue may come from just 20% of customers —so retention is key.

Tip: Identify opportunities for upselling

Explanation: With the right information, you'll be able to highlight new opportunities with existing customers.

Tip: Streamline communication between teams

Explanation: Keep sales, account management, and customer service teams aligned, so everyone is getting the same info.

Tip: Organize a schedule for client contacts

Explanation: Set a timeline for connecting with key accounts and communicating important information and feedback.

Tip: Centralize your client data

Explanation: Key information should be all in one place to avoid mix-ups or missed opportunities.

Tip: Use the right tools

Explanation: Choose a CRM system like Freshworks for easier, more effective account management.

We're always there to help you with your queries.
If in doubt, feel free to reach out to us at sales@freshworks.com

freshworks
freshworks.com