Account Reviews and Executive Business Reviews (EBRs) Training Course

Professional Development Training Course Outline

Category	Customer Service and Customer Experience	**Duration**	5 Days
Base Fee	$1,500 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

Account Reviews and Executive Business Reviews (EBRs) have become mission-critical in today's customer-centric, data-driven, SaaS-powered business ecosystem. High-growth organizations rely on structured EBR frameworks to strengthen client alignment, showcase measurable value, and proactively manage risk across complex accounts. Through strategic insights, performance analytics, and cross-functional collaboration, modern EBRs ensure customer success teams, executives, and revenue leaders drive predictable outcomes and long-term customer value.

In a competitive business environment where retention, expansion, and recurring revenue optimization define success, effective Account Reviews and EBRs allow teams to elevate stakeholder communication, highlight ROI, and create mutually beneficial growth roadmaps. Account Reviews and Executive Business Reviews (EBRs) Training Course equips participants with the tools, templates, and best practices needed to transform EBRs from routine check-ins into strategic business accelerators that deepen relationships, improve forecasting accuracy, and drive sustainable customer lifetime value.

Programme Curriculum

Account Reviews and Executive Business Reviews (EBRs) Training Course

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5 days

Course Objectives

Participants will learn how to:

1. Master value-driven account review frameworks for high-impact customer conversations.
2. Use data analytics and performance dashboards to drive strategic recommendations.
3. Build ROI-focused EBR presentations aligned with executive priorities.
4. Strengthen customer retention and churn-prevention strategies.
5. Identify upsell and cross-sell opportunities through customer expansion mapping.
6. Optimize stakeholder engagement and executive alignment during reviews.
7. Conduct risk forecasting using predictive customer health modeling.
8. Implement voice-of-customer (VoC) insights into review cycles.
9. Develop customer journey optimization plans based on review outcomes.
10. Utilize AI-enhanced insights and automation tools for smarter EBR workflows.
11. Apply industry benchmarking and competitive intelligence in review discussions.
12. Strengthen collaboration across sales, success, product, and finance teams.
13. Create scalable, repeatable EBR processes for enterprise accounts.

Target Audience

1. Customer Success Managers (CSMs)
2. Account Managers and Account Directors
3. Sales & Revenue Leaders
4. Customer Experience (CX) Professionals
5. Business Operations & Strategy Teams
6. Product Marketing and Product Managers
7. Executive Leaders involved in customer lifecycle oversight
8. Onboarding and Implementation Specialists

Course Modules

Module 1: Foundations of Account Reviews & EBRs

- Understanding the purpose and strategic value of EBRs
- Differences between operational reviews and executive reviews
- Structuring a standard account review flow
- Identifying key stakeholders and expectations
- Avoiding common EBR pitfalls

  Case Study: A SaaS company prevents churn after repositioning its EBR to highlight ROI instead of product updates.

Module 2: Data-Driven Insights & Metrics

- Identifying core KPIs for customer success
- Using health scores and predictive analytics
- Building executive-ready reporting dashboards
- Translating complex data into simple storytelling
- Leveraging AI tools for insights
  Case Study: A CSM uses predictive health scoring to catch early risk signals and retain a major enterprise client.

Module 3: Strategic EBR Planning & Preparation

- Pre-meeting research and alignment
- Creating a compelling EBR agenda
- Utilizing templates and playbooks
- Internal cross-functional preparation
- Setting measurable outcomes for every review
  Case Study: A global account team increases expansion revenue by planning EBRs six months in advance.

Module 4: ROI Storytelling & Value Communication

- Converting customer usage data into business value
- Highlighting financial ROI and operational efficiency
- Visual storytelling techniques
- Tailoring messaging for executives vs. end-users
- Presenting impact with clarity and confidence
  Case Study: A tech services firm secures a contract renewal by reframing metrics into cost-savings outcomes.

Module 5: Stakeholder Engagement & Executive Alignment

- Mapping influence across customer organizations
- Techniques for executive-level communication
- Managing difficult conversations
- Facilitating alignment between customer and internal executives
- Gaining commitments to next steps
  Case Study: A CSM wins executive buy-in after repositioning the conversation around strategic goals.

Module 6: Opportunity Management & Expansion Roadmaps

- Identifying expansion triggers within the account
- Creating multi-quarter customer growth plans
- Cross-sell strategy development
- Renewal preparation within EBR cycles
- Opportunity prioritization models
  Case Study: A software vendor grows ARR by 28% by embedding expansion planning into quarterly reviews.

Module 7: Risk Management & Churn Prevention

- Identifying early warning indicators
- Using risk-mitigation playbooks
- Running recovery plans with customers
- Setting internal escalation protocols
- Documenting and tracking risk over time
  Case Study: A CSM successfully rescues an at-risk account through a structured multi-phase EBR plan.

Module 8: Scalable EBR Processes & Automation

- Standardizing EBR cadences across segments
- Using templates, playbooks, and automation tools
- AI-driven EBR preparation workflows
- Integrating CRM and success platforms
- Continuous improvement through feedback loops
  Case Study: A global company reduces EBR prep time by 60% using automation and AI-based insights extraction.

Training Methodology

This course employs a participatory and hands-on approach to ensure practical learning, including:

- Interactive lectures and presentations.
- Group discussions and brainstorming sessions.
- Hands-on exercises using real-world datasets.
- Role-playing and scenario-based simulations.
- Analysis of case studies to bridge theory and practice.
- Peer-to-peer learning and networking.
- Expert-led Q&A sessions.
- Continuous feedback and personalized guidance.

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.org or call +254769199797

Certification

Upon successful completion of this training, participants will be issued with a globally- recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

a. The participant must be conversant with English.

b. Upon completion of training the participant will be issued with an Authorized Training Certificate

c. Course duration is flexible and the contents can be modified to fit any number of days.

d. The course fee includes facilitation training materials, 2 coffee breaks, buffet lunch and A Certificate upon successful completion of Training.

e. One-year post-training support Consultation and Coaching provided after the course.

f. Payment should be done at least a week before commence of the training, to Fineskill Training Center account, as indicated in the invoice so as to enable us prepare better for you.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price
28 Sep 2026	02 Oct 2026	Online	$1,000
28 Sep 2026	02 Oct 2026	Physical	$1,500
28 Sep 2026	02 Oct 2026	Physical	$0
28 Sep 2026	02 Oct 2026	Physical	$0
28 Sep 2026	02 Oct 2026	Physical	$0
28 Sep 2026	02 Oct 2026	Physical	$0
28 Sep 2026	02 Oct 2026	Physical	$0
28 Sep 2026	02 Oct 2026	Physical	$0

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