



RAB Account Manager
AE Sales Essentials
Training Guide

Updated May 10th, 2020

RAB ACCOUNT MANAGER

Sales Essentials Training Guide for Account Executives

Training

RAB Offers a number of live and on-demand training options for new Account Manager subscribers. The typical training schedule includes:

Account Manager AE Essentials 1:

- Login and desktop tour
- Leads and the master list
- Cold calls
- Activities and Reminders (AM Sales Essentials Part 3: <https://vimeo.com/317110231>)
- Asks
- LIVE Pending

Account Manager AE Essentials 2: (about 10 to 21 days later)

- Q/A
- The AE Dashboard
- Email Articles and Activity at a Glance
- Tools for Outlook and Email
- Advance Asks
- Churn and Ad Spending

RAB also offers FREE live webinars every week covering key aspects of Account Manager. You will need a computer, internet connection and telephone to attend the meeting. No pre-registration is required. See the training section of Account Manager for details.

For **on-demand training** options, see below or visit Account Manager and click the TRAINING button at the top of the screen.

On-Demand Sessions

RAB Account Manager Training Library

For Account Executives		
AM Sales Essentials Part 1: Sign In and Home Screen Tour	 Play	6:35
AM Sales Essentials Part 2: Cold Calls, Leads and the Master List	 Play	10:53
AM Sales Essentials Part 3: Activities, Reminders and MS Outlook	 Play	6:00
AM Sales Essentials Part 4: Asks and Presentations	 Play	5:30
AM Sales Essentials Part 5: Pending Report	 Play	6:30
Working with Agencies and Agency Contacts	 Play	3:20
Account Manager on Your Smart Phone:  iPhone  Android		PDF
Sending Mass Email	 Play	3:27

RAB ACCOUNT MANAGER

Sign In

To sign in, visit <https://www.rabaccountmanager.com>

Welcome Back

Enter Your Username

 Remember Login?

Need help? Call 800-232-3131 and ASK RAB. [Forgot password?](#)

Tips and Tricks

- Use Google Chrome. It's faster and works better.
- The first time you sign in, create a bookmark to make it easy.
- Be sure to checkmark Remember Login.

Your Username: _____ (always an email address)

Your Password: _____ (Your CUMULUS password -- Keep this private)

RAB ACCOUNT MANAGER

Home Screen Tour

Your accounts / contacts and HOME button
Cold Calls
Master Account List (Add new LEADS)
AE Dashboard (LIVE Pending)

Search (3 to 5 characters)
Alpha filter

Your list (Click to open an Account Profile)
Fast one-click shortcuts
Live chat

Tips and Tricks

- Click this  to access RAB research
- Click this  to add to Outlook contacts
- Open the Account Profile to see coop search and traffic / billing history
- Use **COPY CONTACT** to make additional contacts at the same account

RAB ACCOUNT MANAGER

Leads

Leads are unqualified potential accounts. You can add new leads at any time. However, it is your responsibility to make sure a lead is NOT already claimed by another AE. All new leads added by you or assigned by your sales manager follow the same lead rule:

To add a new lead, start by checking the Master List.



Use the **alphabet** or predictive **search** to make sure the lead is not already in Account Manager assigned to another AE. If the lead is not in Account Manager, click the ADD LEAD button.

Master List and Lead Accounts for Chicago

[A](#) | [B](#) | [C](#) | [D](#) | [E](#) | [F](#) | [G](#) | [H](#) | [I](#) | [J](#) | [K](#) | [L](#) | [M](#) | [N](#) | [O](#) | [P](#) | [Q](#) | [R](#) | [S](#) | [T](#) | [U](#) | [V](#) | [W](#) | [X](#) | [Y](#) | [Z](#) | [0-9](#) | [Open](#) | [All](#)

Enter all or part of a company, first name, last name, email address or phone in the search box.

[+ Add Lead](#)

To add a new lead that doesn't appear on anyone's list, click here

Account	AE	Station(s)	Agency	Type	Date	Last Owner	Add
Randy's Bookstore Add Name	Open List	WQAK-FM WRAB-AM WRAB-FM WYVY-FM		Lead		Kim Johnson	<input type="button" value="ADD"/> View Activities
Red Tail Golf	Jean Hetherington	WRAB-AM WRAB-FM		Key	05/17/2016	Kent Crosby	
Reproductive Medicine	Jean Hetherington	WQAK-FM WYVY-FM	Oregon Reproduc	Key	05/17/2016	Kent Crosby	

The Master List will list all accounts / leads that match your search.

If the lead is OPEN, you can simply click the ADD button to add the lead to your list

RAB ACCOUNT MANAGER

Leads

Adding a new lead ...

Add the name, title, phone, and email.

2

After choosing an advertiser, you are ready to enter contact details. Be sure to enter the client's name, phone and email address. Also, checkmark the stations for which you are claiming this account or lead.

Belongs To:

Primary Advertiser Contact:

First Name: *

Last Name: *

Title:

Salutation:

Email Address:

Subscribe to Lists:

Phone: *

Fax:

Cell:

Other:

Home Phone:

Grade:

Station: Select All
 WQAK-FM
 WRAB-AM
 WRAB-FM
 WYVY-FM

Research Category:

Start here by check the list for you advertiser.

1

Start here. If the advertiser already exists in Account Manager, you can select it from the dropdown. To add a NEW advertiser, click ADD NEW link below.

Advertiser: *

Address:

Address 2:

City:

State:

Postal Code:

Country:

Main Phone:

Is your advertiser not on the list? Click below:

[Add New Company](#)

If you advertiser is not listed, click here to add it.

Select your claim and choose a research category.

Be sure to click SAVE at the bottom of the screen!

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Leads

You can follow along with expiring leads on your home screen and in the account profile.

Citizens Medical Supply (p) 555-555-5555

Lead Expires on: 04/21/2019
Request Manager Approval

WRAB-FM
Added On: 02/20/2019

Activities: [Add](#) [View](#)
Reminders: [Add](#) [View](#)
Ask: [Add](#) [View](#)
Files: [Add](#) [View](#)
[Copy Contact](#) [Delete](#)
[Move to Open](#)

David Vesper
Title: VP

Email Address: dcasper@rab.com
Phone: 555-555-5555
Fax:
Cell:
Other:
Home Phone:

Type: Lead
Expires on:
04/21/2019
Request Manager
Approval Station :

- Click here to email your sales manager and request approval
- You can also move unwanted leads back to OPEN before they expire
- To keep a LEAD, you must get approval.
- You will get a lead reminder via email 4 days before a lead expires.

RAB ACCOUNT MANAGER

Cold Calls

Cold calls are not part of your account list. This section gives you a place to track and report cold calling activity on a single, easy-to-use page without adding anything to your account list.



The ONLY required field is company name.

ⓘ Cold Calls (These are not added to your account list)

Company

First Name

Last Name

Program Code

Grade

Phone

Email

Notes

Follow Up Date

Follow Up Time

Cold Call Report

Date	Company	Name	Program Code	Grade	Phone	Email	Notes	Follow-up Date	
08/08/2013	Jame's Repair	Bill James					Notes	08/09/2013	Edit Make Lead Add to Outlook <input type="checkbox"/>

Showing 1 to 1 of 1 entries

- Consider setting a follow-up date. The report below is sortable so follow ups can be grouped together.
- All cold calls drop into an instant report at the bottom of the page and will be included in your One on One.

RAB ACCOUNT MANAGER

Cold Calls

You can also promote a cold call to your account list as a new lead.

Cold Call Report

Date ▲	Company	Name	Program Code	Grade	Phone	Email	Notes	Follow-up Date	Delete
02/08/2019	Bill Davis Motors	Sophia Dearmond			555-555-5555				Edit Make Lead <input type="checkbox"/>
02/08/2019	Warehouse Furniture								Edit Make Lead <input type="checkbox"/>

RAB ACCOUNT MANAGER

Activity

To add an activity, start with SEARCH and use your one-click shortcut.

RAB MEMBER BENEFITS 800.232.3131 AMSUPPORT@RAE

Contacts Advertisers Agencies Cold Calls Activities Reminders Asks Master List Reports

Workgroup > Radio Advertising Bureau > Sales - Central Region > Chicago > Kent Crosby

Search GO

AE DASHBOARD MANAGER DASHBOARD

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | 0-9 | Show All

All Reminders: 0 View Calendar

ADD ACTIVITY FROM EMAIL ALL CONTACTS ADV CONTACTS AGY CONTACTS ACTIVITY AT A GLANCE PRINT YOUR LIST

All Contacts + Add New = Agency Contact Advertiser and Agency Contacts: 37
Extra: 2 | Key: 15 | Lead: 1 | Secondary: 10 | Target: 4 |

RE	Advertiser Contact	Phone	Email	Agency	Type	Grade	Station	Activities: Add View	Reminders: Add View	Ask: Add View	Files: Add View	Copy Contact Delete
	A Plus Movers (p) Josh Lake Owner	972-555-1414		AZ Global Media	Key		WQAK-FM WRAB-AM WRAB-FM WYYY-FM Added On: 10/21/2015	Activities: Add View	Reminders: Add View	Ask: Add View	Files: Add View	Copy Contact Delete
	Bee County (p) Add Name				Secondary		WRAB-FM Added On: 02/20/2019	Activities: Add View	Reminders: Add View	Ask: Add View	Files: Add View	Copy Contact Delete

Add Activity

Date: 5/14/2019

Time: [Dropdown]

Action: [Dropdown: Cold Call, CNA, Presentation, Closing Call, Follow-Up, Service Call, Collections]

Program Code: [Text]

Notes: [Text Area]

Also Apply To: None selected

Add to Calendar

Save

- Always choose an action code
- Notes are unlimited
- Also Apply To allows you to apply the same activity to many accounts / contacts
- Add to Calendar adds the activity to Outlook

Need more help? Ask RAB! Call 800-232-3131 or email amsupport@rab.com

RAB ACCOUNT MANAGER

Asks and Pending

ASKS is where you can track pending PRESENTATIONS. Add a new ASK to file it in your pipeline by pending status. These will appear in your Pending and One on One reports.

Always start with SEARCH and use your one-click shortcuts.

Your Profile | Training | Back to AM v1 | Logout

RAB MEMBER BENEFITS 800.232.3131 | AMSUPPORT@RAB.COM

RAB ACCOUNT MANAGER

Contacts Advertisers Agencies Cold Calls Activities Reminders Asks Master List Reports

Workgroup > Cumulus > Media > Atlanta > Atlanta House

Search GO

AE DASHBOARD MANAGER DASHBOARD

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | 0-9 | Show All

All Reminders: 0 View Calendar

Date Time Type Account: Contact Comment

ALL CONTACTS ADV CONTACTS AGY CONTACTS ACTIVITY AT A GLANCE PRINT YOUR LIST

All Contacts + Add New = Agency Contact Advertiser and Agency Contacts: 34 Secondary: 34 |

RE	O	Advertiser Contact	Phone	Email	Agency	Type	Grade	Station	Activities: Add View	Reminders: Add View	Ask: Add View	Files: Add View	Copy Contact Delete
		NEW 12Tone Music Group-Direct (p) Add Name				Secondary		WWWQ-FM Added On: 05/13/2019					
		NEW Abrams/D/Governor (p) Add Name				Secondary		WKHX-FM WYAY-FM Added On: 05/13/2019					

Ask RAB

RAB ACCOUNT MANAGER

Asks and Pending

There are 3 required fields

Start Date *

End Date *

Notes

Status *

Pitch Date

Closing Date

Is this new business?

Is this an Avail?

Is this Political?

Is this Spec Ad?

Status
Pitched Date
Closing Date

Where would you like dollars from this pitch to appear in your pending report? Click the + next to any station to begin adding your estimates for monthly billing.

Distribute Billing Evenly

+All															
Revenue	Program Code	Total Presented	Total Closed	MAY 2019	JUN 2019	JUL 2019	AUG 2019	SEP 2019	OCT 2019	NOV 2019	DEC 2019	JAN 2020	FEB 2020	MAR 2020	APR 2020
Broadcast	None selected	<input type="text"/>													
Digital	None selected	<input type="text"/>													
NTR/Live Event	None selected	<input type="text"/>													
OTH	None selected	<input type="text"/>													
All Total		<input type="text"/>													

In this section, you'll forecast the ask by month and by revenue type.

No \$ signs or commas

Consider using TAB to move from field to field.

Upload Presentation 1 No file selected.

Upload Presentation 2 No file selected.

Upload Presentation 3 No file selected.

Add to Activities:

Presentation

Add to Activities on ...

Save and Finish

Before saving your ASK, you can attach up to 3 files.

Be sure to click Save and Finish

RAB ACCOUNT MANAGER

Your Pending Report

Click your AE Dashboard ...



To access your pending report, click into your AE dashboard.

And go to LIVE PENDING.

Account	AE	Station	Program Code	% to Close	Close Date	Total Ask	JUN,20	JUL,20	AUG,20	Total
90%										
Pennsylvania Liquor Control Board		All Local		90%	6/21/2020	6,000	0	0	6,000	6,000
Belco		All Local		50%	6/23/2020	4,500	0	1,500	1,500	4,500
Belco		All Local		50%	6/29/2020	10,600	0	3,300	3,300	10,600
Calcagno & Rossi Vein Treatment Center		All Local		50%	7/13/2020	7,000	0	0	3,000	7,000
NJM Insurance Group		All Local		50%	6/25/2020	9,900	0	3,300	3,300	9,900
Pearlie Vision		All Local		50%	6/15/2020	3,600	0	1,800	1,800	3,600
Sure Total						18,500	5,000	2,500	8,500	16,000

Click the SAVE button to save your work.

You can update your % to Close and Closing Date here. Change everything that needs an update, but be sure to click SAVE when you are finished.

To update the dollars you pitched, click the company name. From the edit screen, you can change anything / everything about an ASK.

When you are ready, click SAVE or SAVE AND OPEN in EXCEL.

RAB ACCOUNT MANAGER

Need More Help

Call: 800-232-3131

Email: amsupport@rab.com

Or start an online chat.