SALESASSEMBLY

CERTIFICATION COURSE CATALOGUE

CERTIFICATIONS

Certifications are built by combining a specific set of between 3-4 Modules, each of which are carefully designed to lead learners toward competency in key areas. Certification on a specific skill is obtained once the learner fully completes all of the modules and participation requirements, as outlined for that skill.

Modules within a specific skill can be completed in any order, and attended over a period of time.

SKILL

A comprehensive collection of abilities that impact execution and performance in that specific area.

GROWTH LEVER

The general business outcome that can be expected to be positively influenced by focusing on developing that particular skill.

PERSONA

Recommended individuals to whom that specific program or certification might align best, based on their responsibilities.

MODULE

A singular training program on a specific competency, typically 50 mins in length. Multiple modules (between 3-4) make up skill certifications.

OFFERING DATES/TIMES

All modules are run live, 3 times / year. Dates/times/schedule subject to change.

CERTIFICATION PROGRAMS

SALESASSEMBLY

SKILL CERTIFICATIONS

PROSPECTING

Growth Lever: Building Qualified Pipeline
Recommended For: XDR, AE, AM

Overview Video

Certification Summary

The Prospecting Certification equips revenue professionals with the skills and strategies to break through the noise, build personalized multi-channel outreach, and consistently drive pipeline. Through targeted, expert-led sessions, participants learn how to engage prospects with compelling campaigns, establish meaningful connections, and execute innovative, customer-centric approaches that fuel revenue growth.

PROSPECTING

Growth Lever: Building Qualified Pipeline
Recommended For: XDR, AE, AM

Overview Video

Live Sessions

Anatomy of Effective Cold Email and Social Outreach

This session focuses on the core elements of outreach that capture attention and drive replies. Participants learn how to craft compelling subject lines, structure messages for readability, and apply strategies for LinkedIn and other platforms. The emphasis is on building visibility and engagement through credible communication.

Creating Awareness

This session focuses on how timing and persistence influence outreach success. Participants learn to follow up with the right cadence, stay top-of-mind without overwhelming prospects, and maintain pipeline discipline. The emphasis is on practical examples and techniques that improve response rates over time.

Strategies for Multi-Channel Outreach

This session focuses on orchestrating outreach across email, phone, social, and video in a unified sequence. Participants learn to use the right channel at the right moment to build momentum and increase connection rates. The emphasis is on meeting buyers where they are most responsive to drive engagement.

Anatomy of Effective Cold Calling

This session focuses on preparing and executing cold calls that spark productive conversations. Participants learn openers, objection handling on the fly, and how to confidently secure the meeting. The emphasis is on tone, pacing, and clarity to ensure cold calls feel natural, credible, and compelling.

PIPELINE PLANNING

Growth Lever: Building Qualified Pipeline
Recommended For: XDR, AE

Overview Video

Certification Summary

The Pipeline Planning Certification equips sellers to build and prioritize a high-potential pipeline through targeted research, strategic territory planning, and coordinated go-to-market execution. Participants learn to identify the right accounts, tailor outreach with precision, and collaborate cross-functionally to generate demand. The result is stronger consistency, higher-quality opportunities, and a more predictable flow of revenue.

PIPELINE PLANNING

Growth Lever: Building Qualified Pipeline
Recommended For: XDR, AE

Overview Video

Live Sessions

Account Research & Territory Planning

This session focuses on researching accounts efficiently by uncovering triggers, intent, and strategic priorities. Participants learn a system to prioritize based on fit, engagement, and whitespace. The emphasis is on turning insights into outreach that resonates and building consistent pipeline through structured planning.

Persona-Centric Messaging

This session focuses on crafting tailored messages that align with the goals and challenges of executives, managers, and key influencers. Participants learn practical frameworks and templates to personalize at scale without losing efficiency. The emphasis is on creating relevant, compelling outreach that resonates across buyer personas.

Territory Exhaustion

This session focuses on maximizing results within a territory before expanding to new accounts. Participants learn strategies to fully engage existing prospects, deepen penetration into target accounts, and identify overlooked opportunities. The emphasis is on disciplined execution that ensures no potential revenue is left behind.

Co-Selling

This session focuses on collaborating across sales, marketing, customer success, and leadership to engage complex accounts. Participants learn how to align goals, divide responsibilities, and execute coordinated strategies. The emphasis is on partnership-driven execution that accelerates deal success and pipeline velocity.

POSITIONING

Growth Lever: Building Qualified Pipeline
Recommended For: XDR, AE, AM

Overview Video

Certification Summary

The Positioning Certification equips sellers to articulate value and competitive differentiation in ways that resonate with modern buyers. Participants learn to build trust quickly, align messaging to prospect pain and desired outcomes, and leverage proof points that set them apart from the competition. The result is stronger credibility, more compelling conversations, and increased buyer engagement.

POSITIONING

Growth Lever: Building Qualified Pipeline
Recommended For: XDR, AE, AM

Overview Video

Live Sessions

Building Credibility with Research & Social Proof

This session focuses on establishing trust early by reinforcing messages with third-party validation. Participants learn to integrate industry insights, case studies, and customer proof points into their positioning. The emphasis is on creating authority and relevance that buyers recognize as credible and persuasive.

Positioning Through Value Delivery

This session focuses on framing solutions around the tangible outcomes they create for customers. Participants learn to lead with impact and results instead of features, using frameworks that align product capabilities to buyer priorities. The emphasis is on positioning value in a way that directly connects to business objectives.

Tying Value to Prospect Pain

This session focuses on connecting messages directly to a prospect's challenges. Participants learn to uncover and validate pain points, then position their solution as the most relevant path forward. The emphasis is on clarity, empathy, and tailoring value to ensure buyers see the solution as both urgent and essential.

Strategies to Differentiating

This session focuses on crafting messages that make solutions stand out in competitive markets. Participants learn to compare against alternatives without negative selling and highlight unique advantages in people, product, and process. The emphasis is on creating distinction that resonates with buyers and reinforces why your solution wins.

OBJECTION HANDLING

Growth Lever: Building Qualified Pipeline
Recommended For: XDR, AE, AM, CSM

Overview Video

Certification Summary

The Objection Handling Certification equips revenue professionals with the strategies and techniques to anticipate, understand, and overcome objections with confidence. Participants learn the psychology behind objections, how to respond with empathy and precision, and how to guide conversations toward positive outcomes. The result is stronger customer trust, deeper engagement, and the ability to turn resistance into revenue.

OBJECTION HANDLING

Growth Lever: Building Qualified Pipeline
Recommended For: XDR, AE, AM, CSM

Overview Video

Live Sessions

Understanding the Objection

This session focuses on uncovering the real reason behind a buyer's objection. Participants learn how to use open-ended questioning, active listening, and conversational cues to move beyond surface-level resistance. The session emphasizes diagnosing objections accurately so sellers can respond with relevance and empathy.

Developing Confidence and Trust

This session focuses on building credibility and composure in the face of resistance. Participants learn to manage tone, body language, and messaging to reassure buyers while staying in control of the conversation. The emphasis is on shifting from defensive reactions to thoughtful responses that foster trust and strengthen influence.

Strategies for Overcoming Status Quo

This session focuses on equipping sellers to disrupt buyer inertia and challenge the comfort of doing nothing. Participants learn to reframe the value of change, highlight hidden risks of inaction, and present their solution as the clear next step. The emphasis is on creating urgency by making the cost of staying the same impossible to ignore.

Navigating the Most Common Objections

This session focuses on tactical approaches to the objections sellers face most—price, timing, competitors, and internal buy-in. Participants learn specific language frameworks and apply real-world examples to stay composed, validate concerns, and respond effectively. The emphasis is on keeping conversations productive and deals moving forward.

QUALIFICATION

Growth Lever: Building Qualified Pipeline
Recommended For: XDR, AE, AM

Overview Video

Certification Summary

The Qualification Certification equips sales professionals with the skills to identify and advance high-quality opportunities while confidently walking away from poor-fit deals. Participants learn to uncover buyer intent, apply structured qualification methodologies, and leverage various tools to improve pipeline efficiency and collaboration. The result is a more focused pipeline, stronger cross-functional alignment, and higher win rates.

QUALIFICATION

Growth Lever: Building Qualified Pipeline
Recommended For: XDR, AE, AM

Overview Video

Live Sessions

Getting Clarity: Budget, Timeline, and Pain

This module teaches how to run discovery conversations that surface the most critical qualification factors. Participants learn to ask direct, high-value questions that reveal timing constraints, available budget, and urgent pain points. The session helps sellers structure conversations that result in a clear path forward.

Listening for Buyer Signals

Participants learn how to pick up on both verbal and non-verbal signals that indicate real interest or disengagement. The session includes techniques for reading between the lines, clarifying ambiguous responses, and distinguishing curiosity from intent. The goal is to qualify based on behavior, not just what is said.

Discovering Buyer Motivation

This module equips sellers with strategies to uncover what is driving a buyer’s interest and urgency. Participants learn how to explore emotional motivators, internal pressures, and business goals. The session includes motivational frameworks that support value-based selling and opportunity prioritization.

Disqualification with Confidence

Sellers learn when and how to exit deals that are unlikely to convert. This session includes language for professional disengagement, how to preserve future opportunity, and how to free up time to focus on high-probability prospects. It helps reps gain confidence in saying no, while maintaining credibility and respect.

NEGOTIATION

Growth Lever: Increasing Win Velocity
Recommended For: AE, AM, CSM

Overview Video

Certification Summary

The Negotiation Certification equips revenue professionals with the mindset, preparation, and tactical skills to confidently navigate pricing discussions and overcome resistance without sacrificing deal value. Participants learn to build trust, communicate value effectively, and guide negotiations toward mutually beneficial outcomes. The result is stronger agreements, preserved margins, and long-term, value-driven customer relationships.

NEGOTIATION

Growth Lever: Increasing Win Velocity
Recommended For: AE, AM, CSM

Overview Video

Live Sessions

Pricing Integrity & The 4 Levers

This session focuses on why traditional pricing tactics fail and how to adopt a more sustainable approach. Participants learn a simple method to present, propose, and negotiate terms that build trust at the deal's goal line, reduce discounting, and improve forecasting accuracy by anchoring negotiations in transparency.

Addressing Common Concession Requests

This session focuses on handling the most frequent concession requests with confidence and trust. Participants learn to apply negotiation levers to address discounts, payment terms, and timing requests in ways that strengthen credibility, protect value, and maintain momentum without eroding deal integrity.

Addressing Advanced Concession Requests

This session focuses on navigating high-stakes concession requests. Participants learn how to respond to extreme discount demands, pilot proposals, and tough contractual terms like liability, service levels, or insurance. The emphasis is on applying levers strategically to balance client needs with sustainable outcomes.

The Foundation for Successful Outcomes

This session focuses on treating negotiation as a process, not an event. Participants learn how to introduce pricing early, position and propose with clarity, and manage elements like price increases and lever values. The emphasis is on building a foundation that consistently leads to stronger, more predictable outcomes.

DEAL MANAGEMENT

Growth Lever: Increasing Win Velocity
Recommended For: AE, AM, CSM

Overview Video

Certification Summary

The Deal Management Certification equips revenue professionals with the skills and frameworks to align with stakeholders, understand buyer motivations, and navigate complex sales cycles with confidence. Participants learn to take control of the deal process, maintain momentum, and drive measurable progress through structured, strategic execution. The result is more predictable outcomes, stronger partnerships, and consistent revenue success.

DEAL MANAGEMENT

Growth Lever: Increasing Win Velocity
Recommended For: AE, AM, CSM

Overview Video

Live Sessions

Top Discovery Questions that Get Deals Done

This session focuses on mastering discovery strategies that uncover deal gaps and align buyers to fill them. Participants learn how to transform prospects into problem-solving partners by deploying a Discovery Roadmap, asking curiosity-driven questions, and quantifying outcomes to build urgency and trust.

Cutting Slipped Deals with Mutual Action Plans

This session focuses on why deals stall and how to prevent it with a simple yet powerful tool. Participants learn to replace vague “next steps” with clear, actionable plans buyers commit to, guiding them from first call through go-live while eliminating friction points that derail 80% of deals before signing.

Creating and Sustaining Authentic Buying Urgency

This session focuses on replacing artificial deadlines with urgency that executives respect. Participants learn to uncover compelling events, calculate cost-of-delay scenarios, and craft magnetic messaging that reframes long-standing pains. The emphasis is on building urgency that feels natural and motivates buyers to act.

Going wide Early: Multithreading in the Mid-Funnel

This session focuses on navigating complex buying committees and aligning competing priorities. Participants learn to connect stakeholder goals, leverage the “Three T’s” to empower champions as internal sellers, and identify the right contacts to engage - ensuring influence expands without overwhelming the buying process.

COMPLEX SELLING

Growth Lever: Increasing Win Velocity
Recommended For: AE, AM

Overview Video

Certification Summary

The Complex Selling Certification equips sellers to manage high-stakes, multi-threaded enterprise deals with precision and influence. Participants develop the executive presence, deal coordination, and stakeholder management skills needed to navigate long, layered sales cycles and expand key accounts. Through proven tools and frameworks, sellers learn to drive momentum, win complex opportunities, and deliver sustained growth.

COMPLEX SELLING

Growth Lever: Increasing Win Velocity
Recommended For: AE, AM

Overview Video

Live Sessions

Prospecting the C-Suite

This session focuses on earning executive attention through relevant, high-impact outreach. Participants learn how to craft concise, insight-driven messages, use AI to uncover account triggers, and apply a repeatable framework for C-suite engagement. The emphasis is on credibility, personalization, and precision that breaks through inbox noise.

Building the Case for Change

This session focuses on helping executives connect inaction to business risk. Participants learn to identify cost-of-inaction drivers, quantify lost opportunity, and construct a narrative that motivates change. The emphasis is on creating urgency rooted in data and insight—not pressure—so decisions feel both logical and necessary.

Facilitating Status-Quo-Busting Discovery

This session focuses on leading discovery that challenges current assumptions and reveals unseen risks. Participants learn to develop a point of view that provokes thought, structure a two-way conversation that builds trust, and uncover insights that reframe the problem. The emphasis is on influence through curiosity, not presentation.

Gaining Consensus with a Cross-Functional Buying Group

This session focuses on equipping sellers to guide multi-stakeholder alignment in complex deals. Participants learn to collaborate with champions, secure time with diverse decision-makers, and facilitate structured discussions that surface shared priorities. The emphasis is on orchestrating agreement that accelerates both buy-in and momentum.

VALUE ARTICULATION

Growth Lever: Increasing Win Velocity
Recommended For: AE, AM, CSM

Overview Video

Certification Summary

The Value Articulation Certification equips revenue professionals to demonstrate tangible value through storytelling, ROI, and outcome-driven messaging. Participants learn to connect customer pain with solution impact, communicate in the language of the business, and guide buyers through a structured, compelling process. The result is stronger trust, faster deal cycles, and solutions that resonate and deliver measurable impact.

VALUE ARTICULATION

Growth Lever: Increasing Win Velocity
Recommended For: AE, AM, CSM

Overview Video

Live Sessions

Relevant Storytelling

This module teaches how to craft and deliver stories that speak directly to the buyer's industry, priorities, and role. Participants learn to use storytelling as a trust-building tool, linking real-world outcomes to the prospect's own goals. The session covers tone, structure, and pacing for effective narrative delivery.

Effective Demo Strategies

Participants learn how to execute demos that highlight value, not just functionality. The session covers pre-demo discovery alignment, crafting a storyline that matches buyer needs, and post-demo follow-up that reinforces key takeaways and builds momentum toward a decision.

Telling Your Differentiation Story: People, Product & Process

This module helps sellers develop a compelling narrative around what sets their organization apart. Participants learn how to articulate competitive advantages across their team, technology, and methodology, and how to tailor that message to specific prospect concerns.

Inspiring Action with Impact

This module focuses on making a strong business case through quantifiable outcomes. Participants learn how to present cost-of-inaction scenarios, estimate return on investment, and deliver compelling financial justifications that move buyers forward with confidence.

STRATEGIC ACCOUNT MANAGEMENT

Growth Lever: Retaining & Expanding Revenue
Recommended For: AM, CSM

Overview Video

Certification Summary

The Strategic Account Management Certification equips customer-facing professionals to strengthen long-term partnerships through proactive planning and strategic relationship development. Participants learn to lead renewal and growth conversations, support customers through change, and deliver consistent value across the customer lifecycle. The result is stronger retention, sustainable expansion, and mature, high-value accounts.

STRATEGIC ACCOUNT MANAGEMENT

Growth Lever: Retaining & Expanding Revenue
Recommended For: AM, CSM

Overview Video

Live Sessions

Renewal Strategy

This session focuses on managing renewals as a strategic continuation of success, not a transactional checkpoint. Participants learn to time renewal conversations effectively, align stakeholders, and position renewals around value delivery and engagement that reinforces long-term customer impact.

Customer Health & Churn Mitigation

This session focuses on assessing and improving account health through structured frameworks and scorecards. Participants learn to monitor the right signals, build engagement plans, and act on early warning signs. The emphasis is on reducing churn risk and driving stronger customer retention outcomes.

Change Management

This session focuses on preparing CSMs and AMs to guide customers through product, organizational, or personnel changes. Participants learn tools for managing transitions with clarity and minimizing disruption. The emphasis is on keeping customers focused on long-term value and sustaining adoption during change.

Running Business Reviews That Deliver Value

This session focuses on turning QBRs and EBRs into strategic conversations that deepen customer commitment. Participants learn planning, facilitation, and storytelling techniques that bring insight, strengthen alignment, and uncover new growth opportunities during reviews.

EXPANSION SELLING

Growth Lever: Retaining & Expanding Revenue
Recommended For: AE, AM, CSM

Overview Video

Certification Summary

The Expansion Selling Certification equips revenue professionals to uncover growth signals, map upsell potential, and mobilize internal champions within existing accounts. Participants learn to identify and capitalize on opportunities, execute strategic expansion plans, and align with evolving customer needs. The result is deeper relationships, increased account value, and significant gains in customer lifetime revenue.

EXPANSION SELLING

Growth Lever: Retaining & Expanding Revenue
Recommended For: AE, AM, CSM

Overview Video

Live Sessions

Expansion Planning & Execution

This session focuses on a structured framework for recognizing and activating expansion opportunities. Participants learn to assess account maturity, uncover whitespace, and align cross-functional resources. The emphasis is on positioning new offerings in ways that match evolving customer needs and drive timely growth.

Internal Champion Development

This session focuses on identifying and nurturing champions within customer organizations. Participants learn to build authentic relationships, equip champions to advocate effectively, and sustain their influence throughout the sales cycle. The emphasis is on creating internal advocates who drive momentum and credibility.

Upsell Opportunity Mapping

This session focuses on evaluating the full revenue potential within accounts. Participants learn to analyze usage trends, identify product fit gaps, and align upsell strategies with customer objectives. The emphasis is on initiating value-driven conversations with the right stakeholders to expand adoption and accelerate growth.

Reframing Customer Concerns

This session focuses on transforming objections or hesitation into productive dialogue. Participants learn to validate concerns, reframe them through a value lens, and position expansion as the solution to bigger challenges. The emphasis is on collaboration that builds buyer confidence and creates momentum for growth.

RELATIONSHIP MANAGEMENT

Growth Lever: Retaining & Expanding Revenue
Recommended For: AM, CSM

Overview Video

Certification Summary

The Relationship Management Certification equips customer-facing professionals with the skills to build and sustain trust, align stakeholders, and proactively guide customers through their journey. Participants learn to strengthen partnerships through value-driven interactions, strategic communication, and long-term collaboration. The result is deeper relationships, higher customer satisfaction, and lasting revenue impact.

RELATIONSHIP MANAGEMENT

Growth Lever: Retaining & Expanding Revenue
Recommended For: AM, CSM

Overview Video

Live Sessions

Creating and Utilizing Mutual Success Plans

This session focuses on co-creating measurable success plans that align customer and seller goals. Participants learn to structure plans, define milestones, and ensure accountability on both sides. The emphasis is on using success planning templates to drive adoption, retention, and long-term growth.

Leading Organized and Productive Customer Meetings

This session focuses on running customer meetings that are purposeful, engaging, and action-oriented. Participants learn agenda setting, facilitation techniques, and strategies for summarizing next steps. The emphasis is on preparation and follow-through to build consistency and deliver value in every conversation.

Positioning Yourself as a Partner

This session focuses on elevating the relationship beyond transactions to strategic partnership. Participants learn how to bring insights, add value, and guide customers through challenges. The emphasis is on building influence with tactics that establish sellers as trusted, long-term business partners.

Mapping and Growing Customer Relationships

This session focuses on evaluating the strength of customer relationships and uncovering growth opportunities. Participants learn stakeholder mapping, risk detection, and engagement tactics. The emphasis is on deepening relationships with champions, users, and executives to strengthen retention and expansion.

CONFLICT RESOLUTION

Growth Lever: Retaining & Expanding Revenue
Recommended For: AM, CSM

Overview Video

Certification Summary

The Conflict Resolution Certification equips customer-facing professionals with practical tools to de-escalate issues, manage escalations, and proactively prevent conflict. Participants learn to preserve trust during challenging conversations, collaborate with internal teams, and influence product outcomes in ways that align with customer needs. The result is stronger relationships, protected revenue, and long-term customer success.

CONFLICT RESOLUTION

Growth Lever: Retaining & Expanding Revenue
Recommended For: AM, CSM

Overview Video

Live Sessions

De-Escalating Customers

This session focuses on calming heightened customer emotions and restoring productive dialogue. Participants learn proven language techniques, active listening strategies, and frameworks for managing tense interactions. The emphasis is on regaining trust and shifting conversations back toward positive outcomes.

Escalation Process Management and Best Practices

This session focuses on a structured approach for managing customer escalations internally and externally. Participants learn to triage issues, engage cross-functional teams, and maintain transparency throughout resolution. The emphasis is on timely updates and clear communication that protect relationships and outcomes.

Proactive Expectation Management

This session focuses on preventing conflict by setting and maintaining clear expectations across the customer lifecycle. Participants learn proactive communication frameworks to surface friction points, align on outcomes, and create predictability. The emphasis is on building credibility and minimizing downstream risk through consistency.

RISK MITIGATION

Growth Lever: Retaining & Expanding Revenue
Recommended For: AM, CSM

Overview Video

Certification Summary

The Risk Mitigation Certification equips customer success professionals with the strategies to detect risks early, prevent churn, and strengthen stakeholder alignment. Participants learn to apply structured engagement, data-driven planning, and personalized outreach to protect customer health and drive growth. The result is stronger retention, improved efficiency, and long-term customer satisfaction.

RISK MITIGATION

Growth Lever: Retaining & Expanding Revenue
Recommended For: AM, CSM

Overview Video

Live Sessions

Segmentation and Engagement Models

This session focuses on prioritizing customer accounts based on both risk and potential. Participants learn to apply segmentation strategies and tailor engagement models to each segment's needs. The emphasis is on proactive touchpoints and tiered support approaches that maximize retention and growth.

Creating and Utilizing Account Plans

This session focuses on building dynamic account plans that align customer objectives with internal KPIs. Participants learn to track milestones, forecast growth, and coordinate internal resources. The emphasis is on accountability, with documented next steps and timelines that drive execution and measurable results.

Account Alignment with Execs, Champions & Owners

This session focuses on strengthening internal networks within customer accounts. Participants learn to identify key stakeholders, build executive relationships, and avoid over-reliance on a single contact. The emphasis is on establishing broad coverage that ensures long-term account stability and sustained business outcomes.

Navigating Common Customer Stumbling Blocks

This session focuses on addressing the challenges that often lead to churn. Participants learn warning signs to monitor, frameworks for difficult conversations, and corrective actions when engagement drops. The emphasis is on early intervention to protect account value and strengthen customer retention.