

# Account Manager

## **JOB SUMMARY/Objectives:**

This position is responsible and accountable for revenue retention and growth on assigned customer accounts. The Account Manager will, through a clear understanding of company products and services as well as each customer's strategic objectives monitor customer satisfaction and identify opportunities for revenue growth. The Account Manager will collaborate with the Chief Financial Officer to present solutions to enhance company value and revenue when appropriate. This position reports directly to the Director of Account Management and has no supervisory responsibilities.

## **Essential Functions**

- Retain customers by proactively and consistently engaging with key contacts to determine their satisfaction, needs and objectives through an established trusting relationship.
- Identify revenue growth opportunities for assigned accounts through a thorough understanding of company products (features and value) and collaborate with the Director of Account Management to present a proposal for additional services.
- Identify revenue risk within assigned accounts and engage appropriate internal departments to manage a resolution.
- Review, monitor and evaluate customer contracts and ensure successfully implemented into on-line contract management system.
- Monitor and initiate contract renewal efforts in conjunction with the Chief Financial Officer.
- Oversee and collaborate with the Knowledge Centers to ensure the successful launch and acceptable performance of solutions.
- Assist in planning, developing and organizing customer meetings to include Regional Meetings, Issue Resolving Meetings and Installation Planning Meetings
- Follow up and or communicate company product releases and enhancements to each customer to assure understanding and proper notification. Provide input and concerns to the Director of Account Management for escalation to the Knowledge Centers as necessary.
- Provide input for the planning and preparation of the departmental budget.
- Based on an understanding of their needs and strategic objectives, develop an annual plan to grow satisfaction and revenue for each assigned account.
- Act as liaison for internal and external communications with assigned accounts. Facilitate the introduction to the Knowledge Center as needed and follow up to assure customer satisfaction.
- Provide quarterly status on accounts reflecting progress and unresolved concerns. Immediately report any urgent issues to the Director of Account Management as necessary.
- Participate in cross functional groups to establish marketing campaigns, product direction and product training as requested.
- Document customer information and interaction within the Salesforce system.
- Performs other related duties as assigned by management.

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## Technology Used:

- Salesforce
- JIRA
- Paychex
- Microsoft Outlook
- Microsoft Office Suite, including Excel
- EPL applications as required

## Knowledge, Ability and Skills:

Candidate must possess strong PC skills, excellent oral and written communication skills as well as a demonstrated ability to manage multiple projects.

- Knowledge of Business Application systems and terminology, Salesforce, Jira, Corporate Web tools, XML, HTML, and Internet protocols and security.
- Knowledge of company product/services offerings
- Ability to strategically assist assigned customers through an understand of their business processes and reflect an overall concern for their success
- Ability to understand, articulate, structure and resolve basic client needs.
- Capable of managing conflict and collaborating within company departments to achieve resolution
- Ability to think strategically, analyze issues and take action as required
- Ability to communicate clearly and effectively, both orally and in writing and over the phone.
- Ability to collaborate, communicate and document customer needs to other departments within the company as needed.

## COMPETENCIES:

- **Interpersonal Skills**--Focuses on solving conflict, not blaming; Maintains confidentiality; Listens to others without interrupting; Keeps emotions under control; Remains open to others' ideas and tries new things.
- **Oral Communication**--Speaks clearly and persuasively in positive or negative situations; listens and gets clarification; Responds well to questions; Demonstrates group presentation skills; Participates in meetings.
- **Business Acumen**--Understands business implications of decisions; Displays orientation to profitability; Demonstrates knowledge of market and competition; Aligns work with strategic goals.
- **Strategic Thinking**--Develops strategies to achieve organizational goals; Understands organization's strengths & weaknesses; Analyzes market and competition; Identifies external threats and opportunities; Adapts strategy to changing conditions.
- **Active Listening**- Giving full attention to what others are saying, understanding the issue(s), asking appropriate questions and not interrupting.
- **Problem Solving**-Identifies and resolves problems in a timely manner; Gathers and analyzes information skillfully; Develops alternative solutions; Works well in group problem solving situations; Uses reason even when dealing with emotional topics.
- **Attendance/Punctuality**— consistently at work and on time; Ensuring work responsibilities are covered when absent; Arriving at meetings and appointments on time.

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- **Dependability**--Following instructions, responding to management direction; Taking responsibility for own actions; Keeping commitments; Committing to long hours of work when necessary to reach goals; Completing tasks on time or notifying appropriate person with an alternate plan.
- **Teamwork**-Balances team and individual responsibilities; Exhibits objectivity and openness to others' views; Gives and welcomes feedback; Contributes to building a positive team spirit; Puts success of team above own interests; Able to build morale and group commitments to goals and objectives; Supports everyone's efforts to succeed.

### **Work Environment:**

Work is performed in an office environment and involves everyday risks or discomforts which requires normal safety precautions. Potential of up to 25% travel per month including occasional overnight and weekend.

### **Physical Demands:**

Work is essentially sedentary with occasional walking, standing, bending, carrying items under 25 pounds such as books, papers, small parts, etc.

### **Compensable Qualifications:**

Bachelor's Degree in Business or related discipline required with at least three years of successful sales and customer service experience in business and operation management or the equivalent of education and experience. Experience in the banking and financial industry is strongly preferred.

*The above is intended to describe the general content of and requirements for the performance of this job. It is not to be construed as an exhaustive statement of duties, responsibilities or physical requirements. Nothing in this job description restricts management's right to assign or reassign duties and responsibilities to this job at any time. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.*

Employee signature below constitutes employee's understanding and agreement of the requirements, essential functions and duties of the position.

Employee \_\_\_\_\_ Date \_\_\_\_\_

Witness \_\_\_\_\_ Date \_\_\_\_\_