

JOB DESCRIPTION: ACCOUNT MANAGER

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JOB TITLE	Account Manager
DEPARTMENT/SECTION	Management/Production
REPORTS TO	Directors
FLEXIBLE WORKING	See flexible working policy
LAST UPDATED	v1 / Wednesday 14 December 2022
UPDATED BY	Tom Grattan

OVERVIEW

Account Management is central to all our activity and output, ensuring we give a great experience to our clients and deliver successful projects.

The account manager is the main point of contact for clients, being available to discuss project updates, ensure satisfaction, and make sure aims and objectives are met.

The role requires a combination of customer service and sales skills, gaining an understanding of client requirements to build trust, promote services, and add value where possible.

RESPONSIBILITIES

- Work with the production team to deliver successful projects and ensure clients are satisfied through excellent communication and organisation
- Provide clients with clear timescales and ensure the production team meet deadlines
- Monitor project performance, profitability and costs, and report back to directors
- Understand our clients' businesses, their products/services, and work to ensure they stand out against the competition providing input to develop strategy and deliver services
- Build relationships with clients with regular client meetings (for those with active projects and those we've previously engaged with) to review progress and identify opportunities
- Identify prospects for business development and develop cost estimates, proposals/presentations
- Represent EXP at events and promote our services/portfolio of work

DAY-TO-DAY TASKS

Project Management

- Organise and plan successful projects with realistic timescales, ensuring the production team are working towards deadlines and understand project milestones
- Review and analyse project health (budget, time, resource) and discuss progress with the team
- Update project management software and communicate key updates with clients
- Prepare reports for clients, the production team, and directors to understand project and campaign performance
- Organise regular client meetings to discuss active projects
- Record accurate meeting notes and create actions for the team
- Gain approval/sign-off by clients at key milestones when required

- Work with Finance to ensure billing is correct

Workflow

- Identify ways to improve workflow
- Consider new tools and systems that may enhance project management
- Ensure project management software is kept up to date and is used effectively by the team

Account Management

- Organise regular client meetings/socials to discuss their business and any challenges they face, with a view to promoting EXP services and solutions
- Build and update the CRM to ensure information is up to date, capturing business-critical data and relationship-building details such as birthdays, anniversaries or preferences that would allow us to deliver a better experience
- Keep the team up to date with useful information
- Identify ways to grow client accounts through new business opportunities
- Gain client feedback to inform future improvement

Business

- Stay up to date with business activity
- Stay up to date with business services, the latest trends, sector news and technologies to accurately develop proposals and pitches
- Comply with business policies including client confidentiality and discretion

Proposals

- Identify opportunities, read briefs, and prepare responses
- Work with the production team to produce estimates
- Develop and finalise professional proposals
- Present proposals to clients and new business opportunities

REQUIREMENTS

The account manager must be able to use the following software:

- Microsoft 365 (or as otherwise specified) to produce documents and reports, and to communicate with clients
- Teamwork (or as otherwise specified) for project management
- Hubspot (or as otherwise specified) as the customer relationship management software
- Xero/QuickBooks (or as otherwise specified) to understand client billing accounts

PERSONAL QUALITIES

- Personable and approachable to build trust and long-lasting relationships with clients and the production team
- Organised with the ability to manage multiple projects
- Self-motivated to constantly think of ways to enhance the client experience
- Demonstrate initiative and suggest new ideas and ways of working
- Persuasive and identify ways to sell services to clients
- Confident and engaging in delivering presentations
- Be commercially minded, progressing sales and projects
- Be comfortable with approaching new clients
- Be an excellent communicator – both written and verbal
- Have strong attention to detail
- Flexible and able to solve problems
- Resilient and positive in difficult situations
- Have a passion for brand, digital and marketing, looking at the wider industry to identify trends and opportunities
- Enjoy working as a team

TARGETS & PERFORMANCE

Performance will be monitored regularly through project management data, client satisfaction, and client account value with a target to increase average value. Reviews will be made twice yearly. This will inform discretionary bonuses and salary increases.

ESSENTIAL INFORMATION

- Flexible working available upon request. See flexible working policy.
- Hybrid working with minimum of 2 contact days in the Lancaster office, remainder to be remote at home or wherever suits
- The position may require occasional travel
- 33 days holiday including bank holidays
- Pension contribution