

Job Description – Senior Account Manager

Department: Business Development

Reports To: Director of Business Development and Marketing

Position: Full-time

Job Category (FLSA status): Exempt

Approved By: James Leitner, CEO

Revision Date: 9/5/2019

Effective Date: 9/5/2019

Purpose

The Senior Account Manager is our lead customer contact and is responsible for all points of contact with potential customers and account management for all assigned customers. The Senior Account Manager will also assist the Director of Business Development and Marketing and the Chief Executive Officer with research, marketing, and sales functions including outside sales activities.

Essential Duties and Responsibilities

ACCOUNT MANAGEMENT

- Act as the main point of contact between SMM and our potential clients and cultivate a sense of trust and confidence.
- Manage multiple accounts; develop positive working relationships with all customer touch points.
- Manage customer activity with CRM tools for maximum efficiency and visibility, with carefully executed follow-up to closure on open issues.
- Drive client retention, renewals, upsells and client satisfaction.
- Partner with the Fractional Practice Manager and all internal cross-functional teams to understand customer goals and key performance metrics and exceed those goals.
- Prepare insights reporting, including analysis and research.
- Provide input on new processes and workflows as needed.
- Focus on ensuring we maintain superior customer service levels, operational excellence and strategic insight.
- Understand client's specialty, services, strategy and goals to determine how we can best support them.
- Advocate for both our client and our team – and know how to balance the two.
- Provide project leadership that encourages enthusiasm, innovation, and camaraderie.
- Generate innovative ideas to support customers and boost brand awareness.
- Solicit and use client and potential client feedback to suggest customer experience improvements.

Knowledge, Skills, and Abilities

- Demonstrates a high degree of trust and confidentiality.
- Works well independently and assumes assigned responsibilities.
- Multi-tasks, manages time effectively, and establishes priorities.
- Skilled in efficiency, organization, time management, and prioritization.
- Flexible and functions well in a fast-paced environment.
- Deals well with problems involving several concrete variables in standardized situations.
- Ability to use the phone and internet for research.
- Communicates effectively and relate to people of different cultures.
- Applies common sense and understanding to carry out instructions in written, oral, or diagram form.
- Ability to read and interpret documents.
- Writes routine reports and correspondence for internal and external use.
- Prepares documents for internal and external distribution.
- Proofreads and correct documents, correspondence, and reports.
- Calculates figures and amounts accurately.
- Accurately applies concepts of basic math.
- Defines problems, collects data, establishes facts, and draws valid conclusions.
- Presents a professional appearance.
- Skilled in gatekeeping.
- Speaks effectively before groups of customers or employees of the organization.

Education and Experience

Bachelor's degree and a minimum of 2 years related experience preferred; **or** at least four years related experience and training; or an equivalent combination of education and work experience considered.

Computer Skills

- Expert level knowledge of Microsoft Windows, Microsoft Office Products, especially Word (formal correspondence, reports, presentations), Excel (high-level formula, lookups, analysis, reporting), Outlook, and PowerPoint as well Adobe Acrobat.
- Expert level knowledge of e-mail/scheduling software applications.
- Basic level knowledge of CRM systems.
- Basic level knowledge of website design and editing.

Other Work Demands

- Regular and on-time attendance.
- Excellent communication skills.
- Hours could exceed 40 hours per week.

- Occasional travel by conventional means including aircraft, motor vehicle and the like within the region and to other locations as required.
- Strong presentation skills.
- Strong organizational and time management skills.

Work Environment

- The noise level in the work environment is usually moderate.

Note: To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed above are representative of the knowledge, skill, and ability required and are not intended to be an exhaustive list of all duties, responsibilities or qualifications associated with this job.

Simplified Medical Management, LLC is in full compliance with the Americans with Disabilities Act (ADA) and does not discriminate in regards to applicants or employees and will make reasonable accommodation when necessary.

If hired, I would be able to perform the essential functions of the job with or without reasonable accommodation.

Signature

Date