

# Account Executive

## Job Summary

The Account Executive maintains the relationship between the customer and the company, and strives to build new business wherever possible.

**Level:** Individual Contributor

## Competencies

### Account Management (Level 3)

Building long term, value-based relationships with accounts, developing business and maximizing the revenue they generate while reducing the time and costs in managing them.

**Applies the competency in the full range of typical situations, requiring guidance in only the most complex or new situations.**

- Generates revenue by developing business relationships with customers through telephone and face-to-face meetings.
- Controls revenue by maximizing profits through pricing strategies, margin control and mitigating customer loss.
- Manages sales pipeline from the proposal stage through customer acceptance and implementation.
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### Managing the Sales Process (Level 3)

Following the organization's sales methodology in applying skills and resources to achieve sales targets.

**Applies the competency in the full range of typical situations, requiring guidance in only the most complex or new situations.**

- Evaluates the effectiveness of the sales process to recommend improvement.
- Facilitates/leads the sales process by mapping it to customer responses.
- Adapts the organization's sales process to the size, type and style of customer.
- Utilizes customer profile information to develop account strategy and relationships.
- Deploys all available resources to maximize both organization return-on-investment and customers' desired financial results.

## **Business Development (Level 3)**

Researching and approaching new clients and markets in order to acquire new customers for the company.

**Applies the competency in the full range of typical situations, requiring guidance in only the most complex or new situations.**

- Represents the organization in face-to-face meetings with customers.
- Connects with multiple contacts within the prospective customer's buying process.
- Qualifies the right product / services solution to fit the customer's needs.
- Uses differing sources of information to develop quotes and proposals.

## **Partnering (Level 3)**

Seeking and building partnerships and alliances that further the organization's objectives.

**Seeks partnership opportunities**

- Captures opportunities to partner, identifying existing opportunities and creating new ones.
- Assesses the value of entering into partnerships in terms of achieving short- and long-term goals.
- Initiates partnerships and alliances that promote organizational objectives.

## **Client Focus (Level 3)**

Providing service excellence to internal and/or external clients.

**Provides added value**

- Looks for ways to add value beyond clients' immediate requests.
- Addresses the unidentified, underlying and long-term client needs.
- Enhances client service delivery systems and processes.
- Anticipates clients' upcoming needs and concerns.

## **Fostering Communication (Level 2)**

Listening and communicating openly, honestly, and respectfully with different audiences, promoting dialogue and building consensus.

**Fosters two-way communication**

- Recalls others' main points, taking them into account in own communication.
- Checks own understanding of others' communication (e.g., paraphrases, asks questions).
- Elicits comments or feedback on what has been said.
- Maintains continuous, open and consistent communication with others.

## Planning and Organizing (Level 2)

Reaching goals that are central to organizational success by making and following plans and allocating resources effectively.

### Plans and organizes group activities

- Identifies who needs to be involved and when.
- Identifies who will do what, when, considering group members' skills, needs and, if possible, preferences.
- Sets timelines and work steps.
- Monitors progress and use of resources (e.g., people, supplies, money).
- Makes needed adjustments to timelines, steps, and resource allocation.
- Plans the accomplishment of next steps.

## Collaborating with Others (Level 3)

Working together with others in a cooperative and supportive manner to achieve shared goals.

### Fosters collaboration

- Gives credit and acknowledgement for contributions and efforts of others.
- Provides constructive feedback to others.
- Helps build consensus among members of groups.
- Provides opportunities for all group members to contribute to group discussions.

# Responsibilities

## Account Management & Business Development

- Close sales to new accounts to meet revenue and sales growth targets
- Develop sales strategies, sales plans, and forecasts, and maintain sales funnel
- Manage opportunities through the sales cycle and close new business to increase revenue
- Manage an end-to-end sales pipeline from new customer identification through to sales closure
- Develop and maintain strong business relationships with customers and business partners
- Negotiate and structure sales agreements with new and existing customers
- Meet regularly with the sales manager to update sales forecasts
- Maintain a high level of new business productivity through acquisition of new clients
- Follow up on leads to create sales opportunities
- Locate new business opportunities to supplement existing pipeline

## Knowledge Areas

- Customer Relationship Management (CRM) Software (Intermediate)
- Microsoft Office Suite (Intermediate)
- Software as a Service (SaaS) (Intermediate)
- Salesforce (Intermediate)