Account Representative

Job Summary

The Account Representative negotiates and structures sales agreements with new and existing customers while maintaining positive business relationships.

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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Account Planning (Level 3)

Building a clear plan to achieve revenue goals within an account. Defining roles and responsibilities within the customer and the vendor.

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

- Develops components of the strategic account plan.
- Determines the go-to-market strategy in assigned accounts, developing the right value proposition to drive performance and achieve goals.
- Monitors progresses as measured by share of wallet, revenue, and repeat business within the account.
- Drives connections to identify and nurture the right relationships.
- Delivers regular status reports on accounts.

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.

Fostering Communication (Level 3)

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

Adapts communication

- Tailors communication (e.g., content, style and medium) to diverse audiences.
- Reads cues from diverse listeners to assess when and how to change planned communication approach to effectively deliver message.
- Communicates with all organizational levels.
- Understands others' complex or underlying needs, motivations, emotions or concerns, communicating effectively despite the sensitivity of the situation.

Negotiating (Level 3)

Seeking to resolve different perspectives or matters of dispute by discovering shared interests and finding mutually acceptable solutions.

Manages negotiations by building a constructive environment

- Creates an open and constructive environment for negotiation, assuring all parties that a fair solution will be attained.
- Persuades others to review their demands and reconsider their positions.
- Expresses ideas/solutions in an appropriate manner to over come resistance, complaints and frustration from others.
- Builds rapport with the other parties to foster positive and productive relationships.
- Creates value based on shared interests to produce win-win outcomes.
- Articulates how personal biases and cultural differences may affect negotiations.

Problem Solving (Level 2)

Identifying problems and the solutions to them.

Solves basic problems

- Identifies straightforward, practical solutions, when predefined solutions are not applicable.
- Selects solutions to basic problems, considering predefined options and using clear criteria/procedures.
- Verifies that problems have been solved.

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.

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.

Responsibilities

Customer Service & Support

- Develop promotions to encourage more interaction and sales from the customers
- Negotiate and structure sales agreements with new and existing customers while maintain positive business relationships
- Travel throughout the territory regularly to ensure sales support and service for new and potential clients
- Provide regular technical and sales training for new and current accounts
- Generate new business and develop value-added solutions for existing customers
- Update tracking reports daily to reflect prospective clients, leads, and sales metrics
- Interact with a variety of personalities and ensure superior customer satisfaction through professional customer service
- Ensure consistent adherence to merchandising and customer service standards
- Review tracking reports to gauge success and to address issues with team lead to ensure that sales targets are met
- Maintain current knowledge of market conditions and competitors activities to develop sales plans that achieve or exceed sales goals

Knowledge Areas

- Customer Relationship Management (CRM) Software (Intermediate)
- Microsoft Office Suite (Intermediate)
- Salesforce (Intermediate)