

## **ROLE PROFILE**

<b>Title:</b>	<b>Specialist, Account Management</b>
<b>Function:</b>	Account Management
<b>Reports To:</b>	Manager, Account Management
<b>Location:</b>	Toronto
<b>Type:</b>	Full-Time

## **Role Description**

The Specialist, Account Management is responsible for the daily operations of assigned account(s), assisting the Account Management Team in the execution of engagements, new business development, account plan development & execution, delegating to and supervising the work of Associates, Account Management, and the management of client relationships from both a tactical and strategic perspective.

This position reports to the Manager, Account Management for assigned clients and/or industry verticals.

## **Primary Responsibilities**

- Manage large scale projects which include: developing detailed project plans and establishing resource requirements, creating business requirements documents, project cost estimating, and co-ordinating the work of all team members to ensure project timelines are being met and project scope is being managed.
- Work closely with the Client Management Team to develop new business proposals, customer behaviour analyses, post-campaign analysis, training materials, marketing strategy documentation, and other value-added materials for presentation to the client.
- Proactively seek opportunities to improve account operations and reduce inefficiencies to ensure client margin goals are being achieved.
- Proactively makes suggestions to grow accounts and deliver value-added services to clients.
- Establish and maintain effective working relationships with client teams, vendors and partners, as well as Exchange Solutions people.

- Manage direct mail and email campaign execution including: understanding segmentation strategy & current business objectives; drafting analysis proposals: mailing extracts: and managing the operational side of the fulfillment process.
- Proactively seek to understand and master corporate strategic direction and apply to specific client engagements.

### **Capability Requirements – education, skills & experience**

- University degree in business, economics or sciences. Other disciplines are also acceptable with relevant work experience and/or additional education in business, economics or marketing.
- 3-4 years of relevant experience in an Analyst, Consultant, Marketing Co-ordinator or Junior Marketing role at an agency, financial institution, professional services firm or a technology firm.
- Knowledgeable and experienced in marketing, campaign planning & execution, business performance improvement and project management, preferable in environments using segmented customer information, large databases and technology.
- Has high comfort and aptitude for learning new software.
- Advanced project management skills and experience – planning, documentation, budgeting, tracking, estimating, etc.
- Excellent verbal and written communication skills. Includes the consolidation of analyses and reporting of findings in both written report and presentation formats (i.e. internal/external presentations, BRD (business requirements document), proposals and correspondence). Effective listening skills are essential.
- Effective user of Microsoft Project Office, Word, Excel and PowerPoint.
- Asset to have experience in SQL or SAS products, and/or have worked in a client service environment.
- Experience in implementing customer relationship management (CRM) or customer value management systems would be a definite asset.
- Demonstrated interest in continuous improvement and learning.
- Proven communication and relationship skills to understand requirements and work both independently and within a dynamic project team/matrix environment. Good time and personal management skills are essential.