

ROLE PROFILE

Title:	Specialist, Account Management
Function:	Account Management
Reports To:	Manager, Account Management
Location:	Toronto
Type:	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.