

## ROLE PROFILE

<b>Title:</b>	<b>Director, Client Success - Major Accounts</b>
<b>Function:</b>	Client Success
<b>Reports To:</b>	Vice President and Head of Client Success
<b>Location:</b>	Toronto
<b>Type:</b>	Full-Time

## Role Description

The Director, Client Success – Major Accounts is responsible for overseeing and ensuring customer success for the Major Accounts – Loyalty and Gift Card account. This includes ensuring the growth towards the Exchange Solutions strategic direction of scalability on our platform product.

The Director, Client Success – Major Accounts will contribute to setting the direction, planning and budgeting within the Client Success business. They will also be responsible for identifying new revenue growth through renewals, account expansion or cross-sell opportunities.

This position will provide daily management and leadership to cross-optimized Client Success resources. They will inspire a strong, cohesive team of resources and manage operational excellence through cultural and change management success. This position collaborates with various parts of the business including analytics, technology, sales, pre-sales, marketing and finance, while contributing to the overall business and new product growth.

## Primary Responsibilities

- Responsible for overseeing and managing major account revenue and profitability and proactive portfolio growth through renewals, account expansion or cross-sell opportunities.
- Develop and maintain strong major client relationships and ensure a high level of client satisfaction in both the Loyalty and Gift Card business.
- Leverage a deep understanding of the client's business, programs and external market influences to inform/drive conversations around program evolution.
- Act as key lead with major program changes and participate in key contract management and negotiations.
- Take a continuous improvement approach to standardizing and streamlining processes across the account and projects to ensure scalability and operational excellence.
- Develop and manage client-level metrics and goals as part of an annual and quarterly planning process with ownership in meeting and exceeding those goals.
- Oversee and ensure all major Account processes and controls, including escalation and outage support, risk and fraud prevention, are in compliance with all contractual obligations.

- Contribute as a leader to the overall Exchange Solutions operations and culture through embodying and fostering our core values and organizational policies.

## Capability Requirements – education, skills & experience

- Post-secondary education with a degree in Business or equivalent knowledge/capability from other university disciplines and/or work experience.
- Minimum 5 years managing multiple clients and/ or client projects simultaneously, with either direct or indirect client relationship management responsibilities.
- Minimum 8 years Program and Project Management/Leadership proven experience in leading teams to complete major tasks on time.
- Minimum 8 years of direct Client Relationship Management responsibility - knowledge of the client, ability to cultivate relationships with appropriate client contacts, and accountability for client results and outcomes.
- Minimum 8 years of successful Client Performance Improvement experience – this could include strategy and performance improvement responsibilities at a consulting firm, a marketing/ad agency or some other marketing services-oriented firm).
- Must possess solid, verifiable track record in over/achievement of successful Account Management revenue generation.
- Industry vertical experience a plus (either in Retail Banking, Retail, eCommerce or other online businesses) (ideally both Canada and US).
- Strategic and tactical marketing experience a plus; ideal candidates will also have a sound understanding of CRM tools & technology and performance-based marketing techniques.
- Full range of superior communication capabilities: effective listening, business to technical translation, verbal, written, formal proposals and presentations to client executives, internal communications, design documentation, training, meeting management, decision maker relationships.
- Well-developed leadership, coaching and mentoring skills in the effective management and development of teams through change management and succession planning.
- Highly developed at complex problem solving with demonstrated decision making ability.
- Strong business acumen with the ability to influence; has a proven ability to collaborate at a senior level.
- Ability to lead innovation through creative and visionary thinking.
- Strong strategic planning skills which focus on overall business objectives.