

Role Description

Title: Account Manager

Reporting to: Account Director

To: Ensure the smooth, timely and successful delivery of fundraising campaigns and act as the main point of contact for all campaign and operational matters specific to designated client accounts.

In a way that: Is client and service focused. Delivering its services so that client feedback is exemplary

So that: Woods Valldata has a sector leading client services offering, which is proactive, efficient, and acknowledged as sector leading. To ensure customer and internal feedback is exemplary

Key priorities:

- **Campaign Management** – delivery of campaigns on time and to client and internal expectations
- **Client retention** – by offering proactive, exemplary service standards to all clients
- **Query resolution** – setting sector standards for both quality and speed

General priorities:

- Support the Account Director as required in and around the following areas;
 - System, data and physical security within the department
 - Health and Safety of all departmental areas
 - Compliance with PCI and GCRTS and other relevant standards
 - Continuous improvement initiatives
- Participate and take an active role in meetings, offering opinion, and helping lead debate
- Work closely and collaboratively with all internal teams to achieve common goals
- Ensure that all working practices are carried out adhering to agreed standard operating procedures
- Contribute to the creation of SOPs and articles for knowledgebase to inform and protect future tasks and queries

Departmental priorities:

- Ownership of campaign management and campaign related operational activity
- Thorough understanding of a client's campaign requirements, prepare briefs and distribute to relevant internal teams on time
- Managing campaign related feedback between internal teams and clients where required
- Timely and successful delivery of campaigns according to the client's needs and objectives
- Review of SLA performance and escalation of any service provision issues or concerns to the appropriate head of department
- Ownership of client status calls inc. agenda, reports and actions (frequency determined by WVD)
- Attendance at client meetings where required
- Contribution to QBR stats as required
- Record billable activity within Jupiter for invoicing
- Completion of month end billing
- Ownership of client operational specification/brief
- Monitoring and management of clients tickets via Zendesk to WVD defined service levels
- Acknowledgment of client queries within 24 hours of receipt and solutions provided within agreed timeframes

- Provide relevant client feedback to Commercial team where opportunities known and to maximise revenue from each client
- Provision of accurate and up to date quotations for each campaign, ensuring quotations match the campaign brief; ensure all quotes are approved by the Commercial team prior to submission to a client
- Completion of the campaign segmentation matrix
- Updates to forecaster tool in relation for campaigns
- Internal management of incidents as per the WVD Incident Management Process
- Preparation and submission of final quotes to the Finance team for invoicing; the Account Manager is responsible for ensuring that all billable activities are invoiced at the correct time

Whilst particular reference is made to the above procedures it is a stipulated requirement that an awareness and compliance is necessary with all relevant Valldata Woods Group Policies and Procedures.

Skills and experience:

- Min two years' account management experience
- Excellent interpersonal and communication skills - able to converse comfortably with all levels of staff and clients, remotely and face to face
- Client-orientated with a clear understanding of the business environment and the Company's goals and values
- Accustomed to multi-tasking, working to deadlines and effectively prioritising work with competing deadlines
- Strong organisation and problem-solving skills
- Strong computer literacy
- Exceptional attention to detail
- Reliable, organised, self-starter who consistently meets deadlines
- Ability to remain calm and measured in pressurised situations
- Able to work independently and as part of a team
- Comfortable working with evolving processes and procedures