

Reports to: Director of Accounts

## **Key Objectives**

- Achieve assigned goals for growth in client recurring services and project engagements
  - Maintain active client communication regarding the success of their existing services and potential for further success in new services
  - Retain new clients and manage client onboarding & relationship development
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## **New Business Development**

- Employ methods to generate leads for new business
- Meet with qualified leads to identify needs and develop proposals
- Work with production team to estimate projects properly and accurately
- Meet or exceed new business targets established quarterly and annually

## **Client Communication & Growth Management**

- Manage, strengthen, and grow the relationship with a group of assigned clients, through activities including, but not limited to:
  - Ensure clients know and are reminded of the value and scope of the services they are receiving from Engenius
  - Engage clients through individual and mass contact, events, and video calls
  - Manage ongoing client appreciation efforts, including birthday cards
  - Develop and present digital marketing recommendations to meet clients' specific needs, goals, and budgets
  - Identify new, efficient, & sustainable methods for strengthening and growing client accounts
  - Work collaboratively with the marketing department to coordinate contact nurturing touchpoints and events
  - Meet or exceed quarterly assigned revenue targets
  - Learn from the Production Team the effectiveness of recurring services for each client
  - Make proactive recommendations to clients, based on effectiveness, of changes that can improve overall success
  - Proactively communicate to clients with new recurring services, ensuring their expectations are managed properly and their understanding of success is properly framed
  - Manage client budgets and manage invoicing of assigned client accounts

**Website Health Reports**

- Create and deliver Website Health Reports to clients
- Identify opportunities to offer a complimentary WHR when it may lead to higher client engagement

**Client Referrals**

- Seek referrals from existing clients for new business
- Successfully hand-off new business leads to new biz dev team members
- Identify and execute an appreciation process for clients who refer new business

**Accounts Standards**

- Log all time accurately, at least 37.5 hours per 40-hour week worked
- Mark billable time as billable
- Identify all available opportunities to serve a client better
- Manage client information, contact data via CRM, and client documents & agreements
- Actively communicate with clients clear expectations

**Overall Responsibilities**

- Adhere to and promote Engenius' Core Values & Principles of Good Business
- Follow all processes and procedures; propose changes for good to your supervisor
- Meet quarterly targets
- Update Hubspot CRM with all client communication
- Attending meetings as assigned (daily huddles, weekly team meetings, 2<sup>nd</sup> Fridays, and off-sites)
- Other tasks as assigned