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CLIENT ACCOUNT MANAGER
JOB DESCRIPTION & PERSON SPECIFICATION

NAME:
DEPARTMENT OR TEAM: Sales and Channel Incentives
REPORTS TO: Client Success Lead

Objectives of Role:

Working within the Sales and Channel Incentives Team, this role is responsible for:

- Delivering client projects to a high standard, and contributing to the revenue and profit for the company
- Ensuring client retention and satisfaction.
- Managing the financial aspects of client jobs. Working with Commercial Accountants in the Finance Department to ensure jobs are set up correctly and budgets, cost and time allocations are monitored and correct. Ensure budgets are up to date, check redemption reports, and ensure invoices are raised within agreed timescales.
- Within existing accounts, to work with the Client Success Lead (CSL) to upsell current projects, cross-sell BIW's services and identify new opportunities, in order to maximise revenue and profit per client.

Responsibilities:

To include, but not be limited to, the following:

- To play the lead role in the delivery of client projects, including client liaison, management of internal resource departments and management of external suppliers.
- Ensure all technical documentation is written to ensure all client requirements are considered, documented and are clear to the delivery team.
- Lead briefing meetings with the Business System Analyst and (where required) developers.
- To be the escalation point of contact for all participant queries via phone and email.
- To manage the delivery of the programme communication plans.
- Responsible for developing, maintaining, and keeping up to date all programme websites via a content management tool.
- Overall responsibility for programme and client data by defining what data is required, in what format and the frequency the data is required. Also determining how the data can be imported / integrated into the programme's system.
- From a systems perspective be responsible for creating, updating, and maintaining promotions within a database.
- Creating the design briefs and then briefing the internal creative department.
- Manage all technical project briefs with the Business Systems Analysts to ensure client requirements are considered, documented and clear to the delivery team and carry out User Acceptance Testing once development is completed. .
- To set up and lead client meetings (where appropriate), creating agendas, PowerPoint presentations (where required), communicating, creating, and following up on contact reports within agreed timescales.
- To manage all financial aspects of client projects, including using the in-house financial system, working with commercial accountants to set up jobs and budgets,

monitor cost and time allocations, keep budgets up-to-date, issue invoices within agreed timescales, close jobs and set up purchase order trackers.
- To project manage client jobs, including taking responsibility for timelines, reporting, management of client and participant communication including contact reports, status reports and maintaining electronic and paper (if applicable) files. To work with your CSL to actively identify new business opportunities within existing accounts and upsell existing projects and to play a lead part in the account development plan for each client.
- To contribute towards a team GP target by ensuring timesheets and budgets are kept up to date and all work is quoted and approved by the client before commencement and by creating efficiencies and best practice ways of working
- To act as line manager to Client Account Executives (if applicable).

This job description should be regarded as providing guidelines within which an individual works. Other duties within the skills and capabilities of an individual may be assigned from time to time.

Person Specification:

- Significant client service experience in an agency environment or significant client-side experience in similar role.
- Significant project management experience, including responsibility for meeting deadlines, reporting on progress, leading project teams.
- Previous financial responsibility, with evidence of managing costs or monitoring budgets.
- Excellent interpersonal skills, able to build positive relationships at all levels and with all types of people.
- Excellent communication skills – verbal, written, presentational – with clarity of expression.
- Commercial outlook.
- Experience of working with Microsoft Office applications (Word, Excel, PowerPoint
- Passion for quality.
- Credibility in front of clients.
- Excellent time management and task management skills.
- Significant subject matter experience.
- Experience in the Performance Improvement arena.
- Experience in working with technology and systems i.e., websites.
- Experience in working with data.
- Demonstrates BI WORLDWIDE's Values

The relative importance of these requirements will vary, particularly in relation to the client, account, programme, or event to which the job holder is assigned.

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