

Corporate Account Manager Job Description

Duties and Responsibilities:

1. Acting as the client advocate and charged with maximizing customer satisfaction, account penetration and profitability in selected accounts, this position is directly responsible for the coordination and orchestration of all internal resources and external vendors.
2. Responsible for coordination, completion or delegation of all elements relating to the successful sale, including but not limited to product specification, design services, order entry, acknowledgment verification, order expediting, logistics, installation services, invoicing and collection.
3. Performs additional responsibilities as requested.

Essential Functions:

1. Prepare Bid response documents
2. Coordinate the quotation of custom products, specials, COM's, carton/crate charges, freight, special handling, surcharges, storage, demurrage, trash disposal, elevator, installation, electrical, data cabling, and other product or service charges reasonably anticipated in the course of the project.
3. Work with sales management in securing and accurately applying special pricing agreements.
4. Prepare/Assist in completion of Job Site Summary
5. Prepare/Assist in the creation of proposals
6. Secure credit information, credit references, lease application & deposits
7. Prepare order entry packets & verify furniture specifications
8. Prepare master project schedule, Gantt chart, truck schedule, order status reports or other documents and reports necessary for the successful completion of the project.
9. Work with Team and PC's to ensure that order acknowledgments are accurate and that estimated ship dates correspond to product required dates.
10. Coordinate completion of installation drawings
11. Coordinate with installation site resources for:
 - a. Insurance Certificate Processing
 - b. Loading Dock & Elevator Scheduling
 - c. Truck Permits
 - d. Trash Disposal Containers
 - e. Building Protection
12. Perform Change Order Management
 - a. Follow-up on discrepant order acknowledgments
 - i. Obtain Mgmt. approval for negative profitability orders

Note: All order modifications must be processed through accounting

Note: All manufacturer ship date changes must be processed through TeamDesign (web site & status reports must be accurate)

Note: Ship date changes could be processed by order coordinator or project manager

13. Coordinate and supervise installation resources
14. Work with PC's & AC's on the processing of shipment related issues: freight claims, damage, erroneous shipments and shortages
15. Process punch list with client & write up related product and service punch list orders
16. Assist AC's in collection duties

General Functions & Responsibilities:

- Working in conformity with sales plans outlined by management and promptly and carefully maintaining reports as required by the Employer.
- Complying with all policies and directives of the Employer.
- Conducting all business in an ethical and professional manner, and implementing no policy of or giving no instruction to other salespeople or other employees of the Employer by which may conflict with accepted business ethics.
- Efficient planning for effective time utilization.
- Prompt and effective follow-up of assigned leads.
- Identification of prospective customer firms and the appropriate buying influence within customer firms.
- Contacting and securing of appointments with the identified buying influence within customer firms.
- Identification and qualification of the specific requirements of the customer firms.
- Accurate identification of customer pricing goals and delivery requirements.
- Production of adequate gross profit (in the Employer's sole determination) on each order.
- Maintenance of sufficient call volume to provide an even flow of orders and income to the Employer.
- Achievement of goals and quotas.
- Maintenance of accurate records of all customers and prospective customers.
- Prompt submittal of call reports, forecasts and expense records.
- Maintenance of cooperative relations with all internal departments and fellow employees.
- Development of account profiles including, without limitation, names, specific locations and territories and divisions of national companies and strategic account plans for primary accounts, calls on all such accounts regularly, and delivery to management of detailed reports of same. The Employer may, at any time and in its sole discretion, assign to and reassign from the Employee accounts.