

Job Description

Account Lead, Account Services Department

The Account Lead (AL) focuses on the tactical operations and works with the operations team to provide optimal services to the account. The AL must be able to work effectively and efficiently with both the internal support team and external clients. The AL acts as the liaison and primary contact for the operations team and escalates any issues to the SAM as necessary. Assists the SAM with business development and building client relationships within the client enterprise.

Department: Account Services

Minimum Experience: 3-5 years exp. preferred

Role Location: M&I Offices or Remote

Reports To: Strategic Account Manager

Education: College Degree or equivalent exp.

Skill Requirements:

- Three years experience in travel industry, specifically in operations
- Proven excellent communication skills – written and one-on-one
- Demonstrated track record of successfully managing multiple projects simultaneously

Management Responsibilities:

- Plan events or programs of significance to the customer's business
- Train planners on specific account processes and needs
- Analyze/Improve operational systems and processes
- Develop and update all account forms and processes to meet client expectations
- Track client and individual program budgets to ensure M&I forecast is attained
- Meet with key stakeholders to review time spent on projects
- Running client audits with M&I Controller
- Alert meeting owner of any anticipated account/program budget variances
- Issue resolution with the meeting owners and escalation from the planners
- Identify financial opportunities in post program billing
- Participate in program operations turnovers, program briefings, and program debriefings to ensure account continuity
- Ensure on-going client satisfaction surveys, analyze data, and implement continuous improvement processes
- Provide issue resolution with client meeting owners
- Preparation and presentation of annual business review
- Responsible for document accuracy of operations team
- Responsible for final reconciliation accuracy and timeliness from planners
- Enters new meetings into Cvent
- Participate in applicable company and industry activities and events

Sales Responsibilities:

- Create and Sell Joint Value Opportunities
- Assist business development with sales leads when applicable, sales strategy, pricing, RFP development, presentations, and closing business opportunities inside and outside of assigned account
- Up sell additional M&I service opportunities
- Expand/penetrate existing divisions
- Network with decision makers/management as appropriate
- Promote M&I Performance Improvement programs or products
- Develop and maintain strong and ethical customer relationships
- Gain knowledge of competitors' strengths and weaknesses

Corporate Responsibilities:

- Support all corporate goals and objectives
- Assist corporate management in identifying new marketing and operational opportunities
- Exhibit respect and fairness to all clients, staff, coworkers, suppliers and management
- Demonstrate commitment to overall M&I success



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