



## Job Description for Account Manager

Job Title: Account Manager

Location: Richmond Metro Area, Virginia, USA

### Job Summary

Solves organizational problems for clients by building relationships and determining needs. Conducts the Needs Assessment that details specific organizing solutions. Confirms execution of suggested organizing procedures and product installation that meets or exceeds client expectations. Manages client relationship. Builds and promotes the Abundance Organizing brand within community and industry.

### Job Objective

Oversee teams creating a professionally organized space in the client's home or office. Ensure smooth and stress-free experience for clients in transition. Encourage continued client relationships resulting in on-going organizing work and referrals.

### Job Responsibilities and Accountabilities

- Conducts needs assessment with client to determine client's overall needs and defines scope of services needed, including services of professional partners.
- Reviews company policies and pricing with client; addresses all questions and objections and obtains client approval on terms of service. Provides initial estimate/proposal that includes: project focus, services/products needed, timeline, and cost. Obtains client approval on all conditions of work. Processes initial deposit.
- Coordinates with Operations Manager and support staff to fulfill staffing needs in advance of client project.
- Works with team lead to direct the overall and day-to-day activities of organizing in executing the project; supervises efforts of all team members. Sees the Logistics Checklist through to completion on every client project. Ensures client experience is positive.
- Provides project management services that move the project forward, including managing product procurement and coordinating a multidimensional team of related professionals, organizing consultants, and other labor on behalf of client.
- Manages all communication between client, team members, related service providers, family members, and other relevant stakeholders. Handles all customer service issues, responding to client concerns within one business day. Confirms documentation of key issues in CRM software, entered within 2 business days.
- Monitors quality standards, project budgets, and schedules during jobs and performs corrective action as required when requirements are not being met. Enforces all company policies and procedures.
- Reviews and approves all session notes recording job assignments, activities, and outcomes.
- Closes out the job by reviewing applicable time/travel charges, product costs, reimbursable expenses and calculating balance owed by client. Communicate billing instructions to Accounts Receivable staff. Coordinates invoicing and delivery of all client payments to Abundance

Organizing on or before close of business in same week. Assists support staff with client inquiries regarding fees and payment collection, if necessary.

- Reviews results of and responds to client satisfaction surveys. Reinforces on-going relationship by sending follow up note, and asking for referral and/or recommendations.
- Maintains proactive approach to meeting client's on-going organizational needs, through frequent and timely follow-up, correspondence, and maintenance sessions. Works closely with Team Lead to ensure successful account transition when appropriate.
- Assists in quality control and on-the-job best practices of more junior team members. Communicates training needs to Operations team. Participates in formal and informal feedback processes, including performance reviews.
- Meets or exceeds established conversion rate and revenue goals. Drives sales performance for Abundance Organizing by building relationships that generate industry/trade and existing client referrals.
- Participates in professional organizations to maintain current information about this position and to make contact with professionals in similar positions.
- Pursues/receives training in organizing methodology, project management, and management techniques both inside and outside the company, at the company's request, as relevant.

### Job Qualifications

Education: Bachelor's degree in business, psychology, communication, or equivalent work experience.

Skills: Strong organizational and project management skills, time-management skills; very good interpersonal skills, customer service aptitude; clear and concise speaking and communications ability, good writing skills, basic computer literacy; ability to manage projects according to budget, schedule, and requirements; ability to work independently; arithmetic and numerical reasoning skills; responsible money-handling.

Experience: Minimum one year on-the-job experience in residential or business organizing; must have strong working knowledge of Abundance Organizing methods of organizing, team organizing strategies, needs assessment practices, and client care and retention strategies.

Attributes preferred: Ability to plan/organize/direct/control; ability to deal with ambiguous/conflicting priorities or information; ability to influence people; verbal comprehension, problem solving, aesthetic judgement.

On-the-job-training: Continued training in Abundance Organizing methods of organizing, needs assessment practices, and client care and retention strategies. Abundance Organizing Professional Development Retreat.

Understand, embrace, and embody Abundance Organizing's Core Values:

- We embrace the quirks that make us special.
- We act with resourcefulness and savvy.
- We conduct ourselves with an air of refinement, striving for the highest standards.
- We share our gifts whole-heartedly.
- We form meaningful connections.
- We radiate positive energy.
- We communicate with compassion.

## Relationship and Roles

Promotion from: Project Manager

Supervision received: Abundance Organizing Partners

Supervision given: Team Lead, Organizing Assistant