

# Account Executive Administrative Assistant



**Position:** Account Executive Administrative Assistant

**Status:** PT (Non-Exempt)

**Department:** Sales/Business Development

**Reports To:** Senior Relationship Executive

## ***Summary/Objective***

Primary duties include support to the entire Account Executive department, by handling full resolution of tickets, overseeing first line client email communications and addressing pledge errors. Liaison between data team and client as well as internal liaison between other departments and Account Executive Team. Works closely with SRE and other team member(s) to ensure all administrative support is completed efficiently, accurately and timely.

- Functions as liaison between client companies and operations staff.
- Generates weekly, monthly and quarterly reports, tracking work as specified by manager.
- Handles Full Life Cycle of Account Management Ticket Resolution
- Completes AE Call Review/Verification
- Responds to First Line Client Email Communications
- Participates in AE On-Call Rotation for Appropriate Client Coverage
- Coordinates Client/AE Directives with Data Team
- Provides New Client Start-Up Assistance
- Inputs Calendar Entries, Updates AE Client Listing and Maintain Other Records as Assigned
- Creates and Maintains Client Reports as Needed
- Sets up Location/Project and New User in CWW
- Oversees Ticket Premiums and Gift Attributes
- Strives to Resolve Problems Independently
- Oversees Cross Pledges, Overcharges and Similar Issues
- Documents and Maintains Up-to-date Department Procedures and Processes
- Liaison Between Account Executive Team and Other Departments
- Responds to Priority Issues with Urgency and Supports Department to Meet Client Deliverables
- Ensures all Work is Correctly Prioritized and Proofed, Accurate and Timely
- Confirms all Follow-up Work is Completed
- Take Ownership of Work, Observe Trends, Recommend process improvements
- Provide Out of Office or any backup AE Account Coverage As Needs Arise
- Fulfill Account Assignments and Other AE Duties as needed
- Attend AE meetings as requested to provide minute notes and schedule tasks
- Salesforce management as needed

## ***Competencies***

- **Analytical**--Synthesizes complex or diverse information; Collects and researches data; Uses intuition and experience to complement data; Designs work flows and procedures.
- **Customer Service**--Manages difficult or emotional customer situations; Responds promptly to customer needs; Solicits customer feedback to improve service; Responds to requests for service and assistance; Meets commitments.

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## **Competencies (cont.)**

- **Interpersonal Skills**--Focuses on solving conflict, not blaming; Maintains confidentiality; Listens to others without interrupting; Keeps emotions under control; Remains open to others' ideas and tries new things.
- **Teamwork**--Balances team and individual responsibilities; Exhibits objectivity and openness to others' views; Gives and welcomes feedback; Contributes to building a positive team spirit; Puts success of team above own interests; Able to build morale and group commitments to goals and objectives; Supports everyone's efforts to succeed.
- **Change Management**—Develops workable implementation plans; Communicates changes effectively; Builds commitment and overcomes resistance; Prepares and supports those affected by change; Monitors transition and evaluates results
- **Delegation**--Delegates work assignments; Matches the responsibility to the person; Gives authority to work independently; Sets expectations and monitors delegated activities; Provides recognition for results.
- **Professionalism**--Approaches others in a tactful manner; Reacts well under pressure; Treats others with respect and consideration regardless of their status or position; Accepts responsibility for own actions; Follows through on commitments.

## **Qualifications**

- High School Diploma, office and call center experience required;
- Bachelor's Degree or equivalent work experience preferred;
- Administrative Assistant and Account Executive experience helpful;
- Knowledge of office processes, procedures, and technology;
- Experience in supervising projects and team activities;
- Analytical skills, ability to read and interpret data;
- Adept in Microsoft Office Products (Outlook, Excel, Word, etc.);
- Willingness to take ownership of department "body of work";
- Flexibility to work as needed (based on operations)
- Strong organizational, problem-solving, and analytical skills
- Ability to manage priorities and workflow independently
- Acute attention to detail
- Creative, flexible, and innovative team player
- Proven ability to handle multiple projects and meet deadlines
- Ability to deal effectively with a variety of individuals at all organizational levels
- Good judgment with the ability to make timely and sound decisions

## **Escalation Procedure**

While we encourage conflicts to be resolved directly with your supervisor, should the need arise, you may contact the Vice President after all attempts to resolve the issues have been made with the Director of Operations. If further escalation is needed, a request to meet with the CEO can be made by contacting the Executive Assistant.

**I acknowledge that I have read and understand the above job description in its entirety and am capable of performing all of the stated requirements and essential functions therein. This job description will be made available to the employee for electronic acknowledgment.**

*Last updated: 1/1/21*