

JOB TITLE: Account Director

#### OPPORTUNITY

This is a client-facing opportunity at a growing marketing strategy and creative firm. The Account Director (AD) is responsible to lead the overall health and growth of key clients. You will collaborate with business leads, user experience experts, media teams, brand strategists and creative designers to deliver exceptional end products and solutions.

A successful OBI AD is a hardworking, ambitious team player who thrives on the challenge of meeting and/or exceeding OBI and client expectation and ensuring client objectives are communicated clearly, expectations are managed and viable solutions are defined and delivered.

An OBI AD is responsible for being the primary point of contact with the client, driving sales, cross-selling, upselling and identifying new opportunities. A successful AD will be certain to listen to the customer needs, identify OBI solutions or solutions that can help address their needs and share their knowledge, expertise and experience to influence the prospective client or current client in working with OBI.

A successful OBI AD is able to interact with clients regarding the details of their brand strategies, brand position, market research insights, messages, campaigns, marketing plans, digital solutions, etc. As well as conduct or participate in meetings, compose professional emails, letters or memos, complete the documentation requirements of the job and interact successfully with clients, vendors, employees, peer coworkers and OBI Creative management.

A successful OBI AD will be respected by their Client for their knowledge, acumen, experience and commitment to the clients' success while working within the business goals and expectations outlined by OBI.

#### PRIMARY GOALS (TOP 5):

1. **Sales Performance:** Meet or exceed the monthly department and individual sales and margin goals outlined while maintaining a high level of client satisfaction. Grow agency revenue and find new and unique marketing and advertising projects for the team by working to strategically identify, sell and lead on-going marketing related activities with clients as assigned.
2. **Accountability:** Hold yourself and your peers accountable to the processes and requirements set forth in the organization while proactively setting and managing the expectations for and with the client.
3. **Think critically:** A keen focus around building personal expertise and knowledge in and around your clients industries is a requirement. You should know more about your clients goals, business, opportunities and vulnerabilities than anyone else in this organization, at any time in the duration of the relationship. You must always know and be able to recite their goals.

4. Consultative Approach: Proactively provide thought leadership in strategic marketing and brand ambassadorship to and for your clients and to and for OBI.
5. Leadership and Compliance: Use the requirements of the job description and the organization, along with the tools and training provided by the OBI, to deliver excellent results.

#### CLIENT RELATIONSHIP MANAGEMENT

- Main point of contact (POC) for clients assigned
- Provide proactive, consultative influence when identifying or discussing client needs at all stages of the relationship, inquire and define what success looks like for each project and client and include in the plans and internal documentation at OBI. Refer back to those goals as your true north on each project.
- Be willing to probe on vulnerabilities, issues, and opportunities in an effort to service clients at the highest level and positively, impact their business with our work
- Think forward on how and what you can do as the AD to make working with OBI easier and more convenient for the client
- Provide clarification and set expectations on the boundaries of the relationship up front and as new client contacts are brought into the relationship
- Lead client relationship by displaying excellence in the following: uncovering client needs and pain points, managing the tone and experience in meetings, proactively knowing details and sharing those internally through the project management platform and processes, providing additional context, understanding preferences and nuances to best nurture the relationship and proactively share and display our investment in the client's business and career.
- Ensure that the relationship between the client and the AD drives value for the client, and for OBI
- Owner of client relationship, ensuring history and campaigns are documented in case-study format and available for further use across the company
- Demonstrate leadership and authority in or around the industries or tactical marketing needs of the client so as to serve as a consultative partner in the relationship
- Develop deep and wide relationships with senior management at the client in an effort to be considered a strategic partner, now and in the future (3 wide/3 deep)
- Internal POC for issue / client escalation coordination
- Client reporting
- You will be trained as an AD and PM. If you serve as a PM on an account you will continue to do that until it's transitioned.

#### STRATEGY

- Lead account strategy - marketing initiatives, programs and plans for client, communication with senior management, proactively identify and lead new initiatives
- Industry knowledge leader - stay up to date on trends within client industry and competitors, become the agency expert in that area

- Initiate or contribute to all aspects of the new business process including meet and greets, conferences, lead gen campaigns, proposals, RFPs, etc.
- Responsible for advance planning and accurate projections/forecasting with clients in order to prepare OBI team for upcoming client work and expected associated revenue for company

#### PLANNING

- Owns the client onboarding and/or client project kick-off meeting
- Responsible for gathering necessary client documentation during onboarding and commemorating it in the platform and at kick offs
- Based on the approved strategy, creates Master Creative Brief to set direction, clarify scope, and business value of projects
- Swiftly and concisely write proposals, SOWs, assist with RFP and BD pitches
- Review project schedule + billing set up

#### EXECUTION

- Approver of materials before they go to the client
- Owner of client profitability. Responsible for necessary action to address client overages and/or scope creep, change orders, etc.
- Approval of invoicing and change orders
- Client reporting coordination with client

#### CSAT

- Responsible for the satisfaction of the client on the following aspects:
  - Quality
  - Speed
  - Value: price for work, impact
  - Expectations managed
  - Vulnerabilities identified and addressed

#### QUALIFICATIONS & EXPERIENCE

- 7+ years experience successfully managing technology, marketing or media clients
- Strong client relationship skills, positive attitude, ability to strategize on behalf of the client and OBI, willing to navigate, negotiate and resolve account issues quickly and for the benefit of the organization and client
- Brand ambassador for OBI and our offerings
- Organized, responsible, trustworthy and respectful
- Understands and accepts that from time to time, their work may need to be accomplished after set office hours and is comfortable with this expectation
- Willing to share with manager or subordinates when they don't understand a request, or needs help to complete a project or service.
- Experience developing digital and interactive applications, websites, print and/or media projects a plus

- Ensures quality in all deliverables and ensure OBI goals and profitability goals are met while satisfying the needs of multiple clients
- Responsible self-starter who can both lead a team and be a good team member
- Proactive critical thinker that clients and peers look to and respect.
- Naturally curious and interested in continuous learning of the field and industries related to client portfolio under management
- Excellent communication skills - clear, concise and logical (verbal and written)
- Has a good attitude and willingness to learn.
- Strong presentation skills
- Strong computer skills (MS Office and Google apps for work) and comfortable in learning other OBI-relevant tools / apps
- Compliant with process adjustments and administrative requests\
- Bachelor's degree or equivalent
- Experience or working knowledge of Adobe Suites preferred/helpful
- Driver's license, insurance equal or greater than statutory minimums, access to a reliable vehicle for transportation to the office and/or client meetings

#### COMMUNICATION:

Must be able to fluently speak, read, write and understand the English language as well as industry terminology related to the job. Able to quickly learn terminology and jargon appropriate to brand strategy, insights, client campaigns and digital solutions. Sufficient fluency to be able to interact with clients regarding the details of their strategies, positions, messages, campaigns, marketing plans, conduct or participate in meetings, compose professional emails, letters or memos, complete the documentation requirements of the job and interact successfully with clients, vendors, employees, peer coworkers and OBI Creative management. Ability to recognize and interpret non-verbal cues, and knows when to stop talking and let the client have the floor. Ability to communicate in a calm and clear manner during periods of intense workload. Ability to communicate regarding expectations with various colleagues, including those who "out-rank" employee. Ability to read a map and or follow GPS directions.

#### WORKSITE CONDITIONS:

Primarily works indoors at the OBI facility maintained by OBI Creative that will typically be in good repair, clean, and well lit. Occasional exposure to variations in temperature, dust, fumes, cleaning products. Frequent exposure to moderate noise from printers, phones, photocopiers etc. Frequent interruptions and changes in priorities based on needs of colleagues and/or clients. Drives to client meetings in various locations, being exposed to extremes in temperature and changes in driving conditions.

#### PHYSICAL REQUIREMENTS:

Ability to gain access to the work area and then safely perform the duties of the job while utilizing standard and specialized equipment, including but not limited to the equipment described below. Ability to perform duties while sedentary, working at a desk and viewing a computer screen for extended periods. Vision and hearing within normal limits, with or without

correction.

**EQUIPMENT USAGE:**

Automobile, phone, laptop and other computer equipment, photocopier, scanner, fax machine.  
Must be comfortable sharing a personal cell phone to communicate with clients during and after hours should the need arise.