

# Account Manager

## Job Description

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### POSITION OVERVIEW

Origin 63 seeks an Account Manager whose core focuses are to build and maintain positive client relationships and to ensure quality and accurate delivery of services by the Origin 63 team.

The Account Manager will oversee a variety of HubSpot and strategy focused projects and serve as the primary point of contact for clients and internal resources, while keeping both the clients' and Origin 63 best interests in mind and acting accordingly. The Account Manager will work closely with Origin 63 team members including HubSpot Consultants, HubSpot Technicians, Strategy Leads, and external providers such as writers, web developers, designers, etc. to ensure delivery of services in a timely and efficient manner.

A major focus of the Account Manager will be building and growing client relationships to increase the value of the account and ensure client satisfaction and retention.

The Account Manager must have strong interpersonal and communication skills and be able to finesse delicate client relationships while driving Origin 63 to produce its best results. Attributes should include a strong but non-aggressive leadership style, as the Account Manager will control the company's use of time and resources. A strong understanding of marketing automation is a plus, but not required.

### Skills

- Must be extremely organized and be able to manage several clients simultaneously
- Have a polite, friendly, and diplomatic manner
- Have the ability to prioritize and manage several tasks at once
- Ability to set and meet deadlines
- Be persuasive without being forceful
- Ability to solve problems as they arise
- Be agile and open to change as the company grows or a client changes direction

## Responsibilities

The Account Manager will be responsible for, but not limited to, the following:

- Client Relationship Liaison
  - Act as main POC for the client and lead standing meetings and ad-hoc calls
  - Handle day-to-day communication with client via email, phone, slack, or other
  - Communicate both good and bad news to a client with tact and in a timely manner
  - Send deliverables to client, receive feedback and request materials as needed
  - Discuss out of scope needs for clients and consult with team to present a plan for additional budget
  
- Project Facilitation
  - Develop and keep up to date a detailed timeline for all campaign deliverables
  - Organize and facilitate the adherence to a project or monthly budget
  - Organize, attend, and participate in project stakeholder meetings
  - Ensure projects adhere to frameworks and all documentation is maintained appropriately for each project
  - Understand project deliverables and components that make up HubSpot Onboarding projects; be able to schedule and assign tasks accordingly
  - Assign tasks to resources & ensure resources have all materials / assets needed to begin work
  - Ensure team members are tracking time accurately in Harvest
  - Ensure task deadlines are met and that project deadlines are on track
  - Help the team to alleviate blockers by solving within the team or escalating as appropriate
  - Undertake project tasks as needed
  
- Account Support
  - Document and follow up on important actions and decisions from meetings including adding action items into our project management tool (Asana)



- Prepare necessary presentation materials for meetings and provide other admin support as needed
- Vendor/Contractor Relations
  - Facilitate deliverables with contractors as needed (may include HubSpot technicians, web developers, other 3rd party vendors)
- Department Growth
  - Suggest ideas for process improvements
  - Identify gaps in process or documentation
  - Assist in documentation of new or modified processes and frameworks

#### **KPIs:**

- Billed hours are within 10% under or over of the total budget
- Achieve a 10% upsell rate for booked revenue each month

#### **Requirements**

- Proven work experience (5-7 years) in a client facing role
- Exemplify our core values
- Thrive in a collaborative yet mobile working environment
- Enjoy what we do and the people we work with
- Excellent listening, communication, and presentation skills
- BA/BS in communications, marketing, or similar field
- HubSpot certifications in sales and marketing tools are required. If you do not have these certifications, but are otherwise qualified, you may seek certifications within the first 90 days of employment

## **COMPANY OVERVIEW**

### **Vision Statement**

Origin 63 is a conductor for meaningful transformation in the lives of our clients, employees, and the community at large.

### **Mission Statement**

Origin 63 is a globally recognized leader in HubSpot onboarding, optimization and training for sales and marketing teams worldwide.



### Core Values

- Be your best competition
- Love what you do and do what you love
- Treat it like you own it
- Be irreplaceable
- Act with empathy and candor

### WHY ORIGIN 63?

- Work from anywhere
- Flexible hours
- Strong culture
- Enjoy what we do and the people we work with
- 100% no bullshit
- Structured on-boarding process to our tools & project management program