



## JOB DESCRIPTION

**Job Title:** Account Executive  
**Department:** Sales  
**Reports To:** Sales Manager  
**FLSA Status:** Exempt

**Position Summary:** An Account Executive acts as business manager by networking, identifying, and developing new clients to build the business.

- Identifies growth opportunities within clients and markets, and creates strategies for winning new business;
- Provides direction and motivation for the effective creation and design of technology solutions on behalf of clients;
- Ensures development of additional revenue streams within company margin expectations
- Partners with the Management Team to develop solutions and services that drive client revenue and profitability;
- Supports New Business Development and ensures successful transition of new customers to client service teams.

**Essential Duties and Responsibilities:** To perform this job successfully, an individual must be able to perform the following satisfactorily; other duties may be assigned. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

### 1. **Manage Client Service Specific Responsibilities:**

- Responsible for overall client relationship and account growth / performance
  - In collaboration with other departments to develop annual key account plans, annual team forecasts as well as weekly reporting
  - Maintain an in-depth understanding of assigned client's business model, business plans, building expansion/improvement plans and technology strategies; communicate unique aspects of client to internal teams
  - Develop ongoing client relationships at management levels
  - Drives account growth by identifying and pursuing new divisions or facilities within existing clients
  - Expand existing business contracts by finding ways to increase account deliverables: design services, facility planning, research, technology trends, business trends, support needs, service reporting, training, system assessments, etc.to gain larger share of clients' total facilities/technology budget(s)
  - Implement and oversee annual iSpace account reviews with key clients (how are we doing, where can we improve and what else can we assist them with).
- Provide direction to the ideation process and oversee project progress
  - Collaborates with Engineering to create solutions that position iSpace to win the business
  - Generates proposals for existing customer new business opportunities
  - Acts as key liaison with upper level external customers and partners (architectural firms, building management, General Contractors, Project Management firms, etc.) during project initiation, solutions presentation and problem-solving phases of project
- Responsible for all aspects of assigned account team performance for project delivery and financial results
  - Communicate and negotiate all financial terms and conditions of a project with the external customer, based on the company's standard terms and agreements

- Oversees and evaluates projects for existing customers based on requests from the external customer, while providing specific and sufficient information via a comprehensive Scope of Work (SOW) for the internal customers; Engineers, Field Services Manager, Project Manager, Programmer, and Field Technicians; if applicable. (Approves SOW)
- Review and approve proposals and invoices for accuracy and profit margins prior to submittal to customer
- Recognize variances, or potential variances, and address as appropriate
- Leverage the Director of Operations to ensure training and process standards are met across the team
- Create strategies to build iSpace's reputation as a partner that provides solutions, not transactions
- Develop strategies and approaches to expand contacts and create new revenue streams within clients
- Negotiate resource allocation and project prioritization issues
- Ensure consistency between teams and sharing of best practices
- Monitor competitive landscape, clients' business climate and industry trends
- Partner with internal teams to understand cost drivers and best practices that will drive improvements in profitability and throughput
- Support New Business Development (NBD)
  - Participates in conversation about what RFP's NBD should pursue based on defined criteria of the right client and the right project.
  - Acts as second set of eyes to ensure pricing is accurate and that prospect is a good fit for iSpace that will result in profitable business
  - Partners with NBD to ensure the successful transition of new customers to client service teams.

## 2. **Serve as a Steward of iSpace Core Values and Brand**

- Excellence: Be the Best. Commit to the Customer Experience. Attention to Details.
- Integrity: Be Genuine. Dependable. Empathetic.
- Expertise: Be an Authority. Knowledgeable. Confident.
- Creativity: Be Visionary. Inventive. Authentic.
- Work Ethic: Be Tenacious. Execute. Teamwork.
- Fun: Be Positive. Fresh. Collaborate.

## 3. **Other duties as needed to meet business needs**

**Competencies:** To perform the job successfully, an individual should demonstrate the following.

**Adaptability** - Accepts criticism and feedback. Adapts to changes in the work environment. Changes approach or method to best fit the situation. Manages competing demands.

**Communications** - Exhibits good listening and comprehension. Expresses ideas and thoughts in written form. Expresses ideas and thoughts verbally. Keeps others adequately informed. Selects and uses appropriate communication methods.

**Customer Service** - Displays courtesy and sensitivity. Manages difficult or emotional customer situations. Meets commitments. Responds promptly to customer needs. Solicits customer feedback to improve service.

**Impact and Influence** - Pursues and wins support for ideas; displays ability to influence key decision-makers; achieves win-win outcomes; uses authority appropriately to accomplish goals; addresses divergent opinions.



**Problem Solving** - Develops alternative solutions. Gathers and analyzes information skillfully. Identifies problems in a timely manner. Resolves problems in early stages. Works well in group problem solving situations.

**Sales Skills** - Achieves sales goals; overcomes objections with persuasion and persistence; initiates new contacts; maintains customer satisfaction; maintains records and promptly submits information.

**Qualifications:** To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

**Education/Experience:**

Bachelor's degree from four-year College or university in business or marketing; or equivalent combination of education and experience.

- External candidates: 7+ years of industry experience, or 7+ years of demonstrated success managing and growing client accounts and leading teams. CTS certification preferred. Degree in business or marketing; strong customer relationship experience and financial acumen required.
- Internal candidates: in depth understanding of iSpace's core values, offerings and internal operations, and a proven track record of strong customer relationship management and financial acumen typically gained by 5+ years with iSpace or in the industry

**Computer Skills:**

Working knowledge and proficiency with Microsoft Office Suite, including Word, Excel and PowerPoint. Dtools proficiency (internal candidates); or the ability to become proficient in Dtools (external candidates).

**Other Requirements:**

- Must have proven ability to drive growth and profitability and lead / influence teams
- Ability to acquire CTS certification within two years of placement
- Strong aptitude for technology
- Must have an exceptional ability to guide teams, influence projects and drive results
- Ability to travel up to 20%
- Willingness and ability to work beyond 40 hours per week during peak periods to ensure client needs are met

**Work Environment:** The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. The noise level is usually moderate.

**Physical Demands:** The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this Job, the employee is regularly required to sit; reach with hands and arms and talk or hear. The employee is occasionally required to stand; walk and stoop. The employee must regularly lift and /or move up to 10 pounds and occasionally lift and/or move up to 25 pounds. Specific vision abilities required by this job include Close vision, Distance vision, Depth perception and Ability to adjust focus.



The above job description is not intended to be an all-inclusive list of duties and standards of the position. Incumbents will follow any other instructions, and perform any other related duties, as assigned by their supervisor.

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**ACKNOWLEDGED: Employee Signature**

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**Date**

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**PRINT: Employee Name**

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**ACKNOWLEDGED: Supervisor/Manager Signature**

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**Date**