

JOB DESCRIPTION

Job Title: Account Manager/Designer
Department: Sales
Reports To: Sales Manager
FLSA Status: Exempt

Position Summary: The role of the Account Manager/Designer is to manage the account relationships by meeting and exceeding the customers' expectations consistently and keeping a sustainable book of business. Provides design and consultative services for assigned accounts and projects.

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. Proactively manages & develops day-to-day Relationships with Assigned Customers

- Able to manage basic client issue resolution with minimal support
- Initiate customer conversations for projects frequently (may vary by customer) to:
 - Ensure iSpace is current with monthly revenue projections in Suite CRM
 - Receive customer requests, manage customer expectations and communicate/delegate to internal teams
 - Clearly communicate iSpace deliverables, customer requirements and timeline needs to ensure iSpace is positioned to execute a successful project
 - Clearly communicate payment terms relating to timeline needs (deposit invoice requirements)
 - Obtain customer decisions, feedback, and approvals in support of project timelines
 - ✓ Signed proposals
 - ✓ Signed Scope of Work
- Schedule site visits with appropriate internal resources at various phases of the projects
- Ensure customer requirements are proactively communicated
- Perform Project Management duties on projects that don't have an assigned Project Manager.
 - Regularly communicate project updates and recaps to customers.
 - Complete meeting recaps, task lists/next steps, follow up items, and status.
 - Manage punch through Project Coordinator.
- Recognize the need for change orders and communicate to customers in a timely manner
 - Utilize Scope Of Work as a tool to hold internal and external customer accountable to their deliverables to ensure successful and timely project completion
 - Work with Field Services to communicate all punch list items and keep customer updated through to completion
 - Participates in client walkthrough, training, and sign-off as needed (defined in Handoff meetings who will be responsible at the project level)
- Successfully hand off all projects that required a Project Manager assigned per stated project qualifications

2. Interior Designer Responsibilities

- Assumes total responsibility for design and specification, and management of project team (if other designers are required).
- Prepare client presentations.

- Leads in ensuring the accuracy of all drawings and specifications before presenting to the selling team member or client – operate with little to no specification errors.
- Demonstrates expert knowledge in design trends and appropriate product application.
- Demonstrates expert knowledge of Teknion research and lead in consultative selling efforts.
- Prepares and presents design contracts, assist Design Team members with contracts.
- Serves as mentor and coach to other design team members.
- Demonstrates expert level rendering and presentation capability.

3. **Manage all Internal/External Communications and Meetings for Assigned Projects**

- The position is responsible for identifying the appropriate level of communication needed for each project (scalability) adjusting meeting content, attendees and project options based on current client or project issues
- The position recognizes new business opportunities with assigned clients
 - Maintains accurate and up-to-date forecast
 - Regularly participates in sales activities that drive revenue to meet annual sales goals
- Creates projects and delegates initial tasks at the appropriate times to the design, project and installation teams
- Update projects with current documentation (proposals, SOW, notes and status)
- Use/distribute Project Workbooks for each project to provide Accounting and Operations details needed to successfully complete their roles within the project
- Using the Handoff Meeting, Kickoff Meeting and Post Op Meeting agendas; schedule, facilitate and lead meetings for all assigned projects/events when necessary based on size and scope of work, or as directed by management and/or leadership
- Work with Field Services and Project Managers (PMs) to confirm completion of customer requirements prior to installation
- Create and disseminate project timelines based on project complexity, customer needs, and internal resources
- Delegate change order creation to Design team or PM
- Approve final paperwork for invoicing; work with accounting to approve margin variances prior to sending to customer
- Approve Invoice in a timely manner (3 business days)
- Send customer all final project documentation: as-builts, code, client sign-off, survey request and transition/introduction to iSpace team
- Obtain estimates for billable labor from the appropriate resources as defined: Design, Project Management, Field Services

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

- We are **EXPERTS**: We provide well thought out solutions to support our client's business needs.
- We are **RESOURCEFUL**: We will find ways to get it done and make it look easy.
- We **VALUE** all **PARTNERSHIPS**: Our partners are not viewed as transactions, but friends. We support each other and celebrate in each other's successes.
- We believe in **TEAMWORK**: All of us together are better than each of us alone.
- We have **FUN**: Having fun is part of our work experience. We bring our culture to life by enjoying ourselves and each other.

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.

Cooperation - Displays positive outlook and pleasant manner. Establishes and maintains effective relations. Exhibits tact and consideration. Offers assistance and support to co-workers. Works actively to resolve conflicts. Works cooperatively in group situations.

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.

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 preferred or equivalent combination of education and experience in Interior, Industrial or Architectural Design and 5+ years' experience in furniture/office/space planning or equivalent combination of education and experience.

Dealership experience preferable. Knowledge of building codes for furniture design required.

2+ years demonstrated success in a deadline driven, customer-experience based business model requiring strong project management skills.

External candidates: 5+ experience in a customer-facing role with some project management experience required. Minimum of 5 years office furniture or design experience.

Internal candidates: typically 2+ years successful performance with iSpace, leading to a strong understanding of iSpace's business model and knowledge of Client Service department operations.

Computer Skills:

Highly proficient with Microsoft Office Suite, including Word, Excel and PowerPoint. Software proficiency - ability to become proficient in others as needed. Advanced proficiency in AutoCAD and specification software(s).

Requirements:

- Strong customer focus with solution orientation
- Must possess strong attention to detail and time management skills
- Strong, effective communication with coworkers and clients at various levels
- Desire and ability to succeed in a fast-paced, results driven environment
- Must be flexible and adept with multi-tasking and changing priorities
- Detail and organizational skills are essential for success



- Ability to manage multiple projects and delegate to other team members
- Must have proven ability to collaborate within teams and cross-functionally and meet deadlines.
- Willingness and ability to work beyond a normal work schedule during peak periods to ensure client needs are met.
- Ability to travel up to 10%

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.

Acknowledged: Employee Signature

Date

Print: Employee Name

Acknowledged: Supervisor/Manager Signature

Date