



ActionFlow Account Manager Job Description/Proposal

Overview:

The primary goals for this role will be to help new clients get onboarded, implemented, and to support them throughout their subscription. This is a key, client-facing role that requires a dedicated professional with an exceptional ability to manage client relationships. The Account Manager will ensure the customer is setup for success, and they will proactively facilitate actions that will drive client satisfaction and retention.

Responsibilities:

Implementation and Onboarding

- Enter all pertinent information for client setup into their ActionFlow Database. This will include, but is not limited to, pricing, schedules, processes, inventory and setting up add - on features.
- Follow internal procedures for client implementation and meet internal benchmarks to ensure the client is getting their first value, and time to first 'win', in a timely manner.
- Ensure Implementation Headquarters is accurate and maintained.

Training

- Train clients on the software to ensure they can navigate and use ActionFlow properly.
- Lead various training calls with clients for the different modules we offer, as well as add-on features.
- Provide clients access to our online training module and monitor usage.

Support

- Answer client questions, help with product related issues and supporting the overall client relationship.
- Train and keep clients informed regarding new features as they become available, or as clients begin using features that are new to them.
- Temporarily support clients assigned to other Account Managers while those team members are on vacation or out sick.
- Responsible for understanding all aspects of the product offerings within our software so that you can provide valuable solutions to our clients.
- Maintain a strong relation with the client and answer all questions they have regarding their ActionFlow account.

Other

- Provide feedback to the development team about what features are valuable to the market.



- Provide feedback on our implementation process and suggest new ideas to better serve our clients.
- Assist with general tasks that may aid the growth and health of the company.
- Suggest adding on features such as Action Pay and Power BI and assist clients when they are ready to upgrade to a higher-level subscription.
- Participate in trade shows and other industry events.

Requirements:

- Education: Bachelor's degree
- Experience: Professional Experience in Account Management and/or Customer Success.
- Excellent verbal and written communication skills.
- Highly organized and detail oriented, along with proficient time management skills.
- Proactive and always looking to deliver what the clients need next.
- Thrives on balancing multiple priorities.
- Comfortable with solving complex problems.
- Solid organizational skills.
- Compassionate and understanding when assisting clients.
- Positive upbeat attitude.
- Quick learner and a self-starter that will ask questions and turn to other for support when needed.
- Proficient in Microsoft Office