

## MANAGER OF ACCOUNT MANAGEMENT JOB DESCRIPTION

**Job Title:** Manager of Account Management  
**Department:** Client Relations  
**Reports To:** Managing Director  
**FLSA Status:** Exempt

### SUMMARY

This position primarily reports to the Managing Director of CHC Wellbeing, Inc. (“CHC”), with a secondary reporting relationship to the Head of Sales. For over 18 years, CHC Wellbeing has worked with companies across the country to create a workplace community that makes employee wellbeing a top priority. We provide a high-touch, onsite and telephonic experience that provides clinically-based interventions that improve member health. Combined with our suite of digital and mobile tools, we go beyond just physical health and provide personalized digital health journeys where the member is in the driver’s seat. Companies that partner with us achieve lower healthcare costs, increased productivity and employees that bring their best selves to work.

The Manager of Account Management’s core responsibility and focus is on the long-term leadership and operations of the Account Management Team. Responsibilities include the day-to-day management of the Account Management Team, KPI’s and forecast management. Manager of Account Management provides a collaborative approach with internal departments to develop and implement growth while maintaining a high level of client satisfaction from annual program year start through program end. This includes, but not limited to, the health screening events from implementation to execution. Plays a significant role in long term planning of client retention and team member growth and advancement. The Manager of Account Management acts as the internal liaison to other departments in collaboration with Sales and Marketing to ensure client expectations and needs are met and available for client and internal meetings when required. Manager of Account Management shall stay abreast of any/all market trends, through our current BoB and make appropriate recommendations to CHC leadership.

### ESSENTIAL DUTIES AND RESPONSIBILITIES

Important responsibilities include, but are not limited to:

#### *Day to Day Management of Account Management Team*

- Manages Account Management Team and acts as internal liaison
- Supports Growth and Advancement of individual account managers
- Responsible for onboarding and continual training of team
- Provides leadership and direction on day to day issues with clients

- Assigns new clients to Account Managers based on Account Managers expertise, tenure and overall bandwidth
- Acts as subject matter expert for all account management related issues
- Supports Sales when needed for client related meetings and issue resolution

#### *KPI and Forecast Management*

- Responsible for management of tracking of Account Management KPIs
- Focus on client retention and development of participation drives and initiatives to promote growth
- In collaboration with Sales and Marketing manages client risk and growth forecast
- Works with individual account managers to ensure KPI compliance or understand gaps and barriers
- Monitor event registration and work with Account Managers to achieve participation goals
- Provide reporting and risk reporting to Executive Management
- Works closely with Human Resources on career planning and performance goals

#### **REQUIRED KNOWLEDGE SKILLS AND ABILITIES:**

- Proven ability to manage multiple projects at one time while paying strict attention to detail
- Ability to work in a team based, collaborative environment
- Experience in managing and directing a team
- Knowledge of HIPAA
- Excellent organizational skills
- Excellent verbal and written communication skills

#### **EDUCATION AND MANAGEMENT EXPERIENCE:**

- Experience in account management or other relevant experience
- Minimum of 3 years' experience in Account Management or related fields
- Experience in the wellness field/industry is preferred
- Minimum of a BA/BS degree or equivalent work experience

**LANGUAGE SKILLS:** N/A

**MATHEMATICAL SKILLS:** Basic skills.

**COMPUTER SKILLS:** Excellent computer skills with proficiency in the Microsoft Suite (not limited to Outlook, Teams, Word, Excel and Powerpoint).

**REASONING ABILITY:** Must possess sound judgment, and business acumen skills.

**CERTIFICATES, LICENSES, REGISTRATIONS:** N/A

**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.

**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. This position requires the individual to be in the office located in Chicago, Illinois a minimum of three days per week and available to support onsite client meetings. Minimal travel required to support prospects and clients (approximately 25%).

\*\*\* \*\*

- I acknowledge that I am able and capable of successfully performing all functions of the job requirements specified above.
- I acknowledge that I am not currently able to perform all of the job requirements listed above but am willing to be trained to meet the job requirements within 3 months of signing this document.

Areas I need additional training to be able to perform job requirements above (please list):

Name \_\_\_\_\_

Signature \_\_\_\_\_

Date: \_\_\_\_\_