

## Position Description – Account Manager

<b>DIVISION &amp; TEAM</b>	Product Growth	<b>REPORTS TO</b>	Head of Revenue (or any other position as determined and advised by JSCL)
<b>BAND</b>	H		
<b>FUNCTIONAL RELATIONSHIPS</b>	<i>INTERNAL</i> <ul style="list-style-type: none"> <li>• GROWTH TEAM</li> <li>• PRODUCT MARKETING TEAM</li> <li>• PRODUCT LEADERSHIP TEAM</li> <li>• PRODUCT TEAMS</li> </ul>	<i>EXTERNAL</i> <ul style="list-style-type: none"> <li>• CLIENTS &amp; THEIR PARTNERS</li> <li>• JADE PARTNERS</li> <li>• INDUSTRY ASSOCIATIONS AND OTHER INFLUENCERS</li> </ul>	
<b>DOES THIS ROLE HAVE DELEGATED AUTHORITY?</b>	NO		

### 1. ROLE PURPOSE

- The Account Manager will be responsible for managing and growing relationships with a portfolio of key clients, ensuring their ongoing satisfaction and success. You will play a pivotal role in driving revenue growth by strategically engaging with clients, identifying upsell and cross-sell opportunities, and ensuring that Jade's offerings consistently meet or exceed client expectations.

### 2. KEY ACCOUNTABILITIES & EXPECTATIONS

#### Client Relationship Management

- Own Client Relationships: Serve as the primary point of contact for assigned client accounts, building and maintain strong, long-lasting relationships with key decision makers.
- Understand Client Needs: Develop a deep understanding of each client's business, challenges and goals to tailor Jade's solutions and deliver value-driven outcomes.
- Foster Client Retention: Ensure client satisfaction through regular communication, service reviews, and proactive problem solving, aiming to exceed client expectations and foster loyalty.

#### Revenue Growth and Account Development

- Identify Growth Opportunities: Continuously look for opportunities to expand Jade's Product footprint within existing accounts, including upselling, cross-selling and introducing new offerings.
- Drive Account Strategy: Develop and implement account plans with clear objectives, timelines, and growth targets aligned with client needs and the Product Business Unit/Jade's business goals.
- Achieve Sales Targets: Consistently meet or exceed revenue targets for the assigned accounts, driving the growth of both individual accounts and the overall business.

#### Sales and Service Delivery

- Coordinate Service Delivery: Collaborate with internal teams (e.g. Product, Operations, Marketing, Customer Success) to ensure the seamless delivery to clients.
- Oversee Project Execution: Manage the successful execution of client projects, ensuring that timelines, budgets, and quality standards are met.
- Problem Solve: Address and resolve client issues or concerns promptly and professionally, escalating when necessary to ensure client satisfaction.

#### Reporting and Administration

- Maintain Accurate Records: Keep comprehensive records of all client communications, meetings and transactions in Jade's CRM.
- Sales Forecasting and Reporting: Regularly update sales forecasts and account status reports, providing clear visibility on the health of client relationships and opportunities for growth.
- Support Account Renewal and Contract Negotiation: Responsible for contract renewals and negotiations, ensuring that client agreements remain aligned with Jade's strategic goals and client expectations.

#### Ongoing Client Engagement

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- Lead client relationship management initiatives, such as business reviews and satisfaction assessments (e.g., NPS), to foster loyalty and identify growth opportunities.
  - Maintain up-to-date records and reporting systems to provide transparency on the sales pipeline and future opportunities.
  - Support client-related activities, including resolving issues, managing escalations, and ensuring continued satisfaction with Jade's offerings.
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#### **Relationship Management**

- Cultivate and maintain strong relationships with key stakeholders, including clients, partners, regulatory bodies and industry influencers to position Jade as a valued business partner rather than a traditional supplier.
  - Act as the primary point of contact, ensuring high levels of customer satisfaction.
  - Collaborate with the Customer Success and Operations teams to ensure continued delivery.
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#### **Strategic Planning and Reporting**

- Contribute to the development of the business development strategy in alignment with the Product Business Units goals.
  - Provide regular updates and reports on sales performance, pipeline status, and market insights.
  - Develop and present forecasts, budgets and business plans to the Head of Revenue.
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#### **Collaboration and Teamwork**

- Collaborate with internal teams and stakeholders to cultivate a high-performance sales culture and deliver exceptional outcomes.
  - Work closely with Marketing to align campaigns with sales objectives and generate opportunities with existing clients.
  - Partner with the Product Team to ensure customer feedback informs innovations and service improvements.
  - Participate in cross-team initiatives to support the Product Business Unit goals.
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#### **Jade Values and Culture**

- You know our values, what they mean to us and behave in line with them.
  - Feedback regarding your behaviour in line with the values from your stakeholders is positive and you seek feedback on areas where you might feel challenged.
  - You keep up to date with our vision and purpose, strategies, and priorities. You ask questions if you don't understand and challenge when you have different ideas.
  - You behave in line with our policies, procedures and legislative obligations.
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#### **Personal Development**

- You have an established training and development plan, in consultation with your People Leader and you commit to delivering against it each year.
  - You engage in regular development conversations with your People Leader and actively work on areas of your development.
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#### **Safety & Wellness**

- You actively participate in and support safety and wellness initiatives.
  - You understand and comply with our safety and wellness policies and procedures including emergency procedures.
  - Report all accidents and incidents, including discomfort and near misses promptly.
  - You keep your work area tidy and clear of clutter and hazards.
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*Other duties as may be reasonably required from time to time.*

### 3. PERSON SPECIFICATION

	ESSENTIAL	PREFERRED/DESIRABLE
<b>Education/Training</b>	<ul style="list-style-type: none"> <li>• Relevant tertiary qualification in Business, Marketing, or a related field. (Equivalent professional experience will also be considered)</li> </ul>	
<b>Experience/Knowledge/Skills</b>	<ul style="list-style-type: none"> <li>• 5+ years in a SaaS based or Digital Technology sales/ Account Management role in the Fintec/ Financial Crime/Financial Services industry.</li> <li>• Strong track record of managing client relationships, including handling multiple accounts simultaneously and achieving sales targets.</li> <li>• Excellent communication skills, both written and verbal with the ability to build rapport and trust with clients and internal teams.</li> <li>• Results oriented with a strong focus on achieving and exceeding sales targets.</li> <li>• Customer focused, demonstrating a genuine commitment to understanding and addressing client needs.</li> <li>• Excellent negotiation, and presentation skills.</li> <li>• Analytical mindset with the ability to interpret market data and trends.</li> <li>• Proficiency in governance frameworks and advanced sales forecasting or CROM tools (Hubspot).</li> <li>• Adept at resolving client issues, managing escalations, and identifying innovative solutions to drive customer satisfaction.</li> <li>• Adaptability and resilience to thrive in a in a dynamic business environment.</li> <li>• Strong team player who works collaboratively.</li> <li>• A high level of business and commercial acumen.</li> <li>• Strong organisational skills including the ability to manage multiple accounts and opportunities simultaneously while maintain up-to-date records and sales pipeline data.</li> </ul>	<ul style="list-style-type: none"> <li>• Established network within the industry or target markets.</li> </ul>