



## Account Manager

**Reports To** Director of Product Development and Meeting Management  
**FLSA** Exempt - Full Time (Remote)

**Description** GENERAL DESCRIPTION OF POSITION

The Account Manager will strategically and operationally support multiple clients/chapters supporting their administrative inquiries, recommending strategic methods for growth/development, monitoring/ensuring compliance with national policies and overseeing the planning and delivery of their annual meetings. They will build and foster relationships with client leaders and strategically assist with committee appointments and board succession planning. They will also periodically oversee the development of training, leadership tools, resources, and programs. They will be responsible for Conferences held across the United States throughout the year in addition to the National or Leadership and Physician Advisor Conference. This position will work as a team with another Account Manager to plan, manage other national events and ad hoc client meetings.

### ESSENTIAL DUTIES AND RESPONSIBILITIES

- Develop and distribute training/resources for client/chapter leaders on leadership, administration, membership, and conference marketing.
- Serve as the primary contact and resource for chapter leaders, providing targeted support for chapter development.
- Manage award programs like Chapter of Excellence (COE) and Chapter of Merit (COM).
- Plan and execute chapter leadership training and peer-to-peer networking programs.
- Support the client /chapter programs with administrative tasks like Chapter Advisory Council.
- Oversee annual elections, managing schedules, nominations, and election results for all boards.
- Guide clients/chapter leaders in monitoring performance and using internal tools to achieve outcomes.
- Maintain and update the chapter board directory and filing system.
- Ensure clients/chapters comply with regulatory, policy, and reporting requirements.
- Work with internal teams to support membership recruitment, retention, and event promotion.
- Collaborate with Marketing to monitor and update client/chapter web pages and social media for engagement.
- Coordinates with sales team to organize logistics of exhibition space.
- Provides coordination for the use of Mobile applications and communications during each event as needed or as applicable.
- Set strategic goals for attendance, revenue, and income with Marketing, Accounting, and Sales teams.
- Prepare and manage annual budgets for conferences and meetings.
- Plan and coordinate logistics for client/ chapter conferences, including venue selection, speaker management, A/V, food, and signage.
- Oversee event registration, customer service, and budget compliance.
- Ensure timely processing of event-related invoices and financial forms.
- Monitor event performance and integrate feedback into future planning.
- Ensure on-site event execution complies with company standards.
- Manage event-related tasks and registration platforms.
- Meet or exceed performance standards and goals related to attendee and exhibitor satisfaction, contracting and event planning deadlines, conference budget adherence, expenses, and revenue targets. Conduct audits post event performance data and integrate said data into future planning.



## **EDUCATION AND EXPERIENCE**

- Bachelor's degree from an accredited college or university required. Master's degree is preferred.
- Minimum of 5 years' experience in a related field. Previous association experience required.
- Demonstrated experience successfully managing customer service inquiries and disputes.
- Experience working with Customer Relationship Management (CRM) systems (e.g., Salesforce) and databases (e.g., MS Excel)
- An enthusiastic approach, self-reliance, and the ability to work successfully with minimal supervision are critical to success.
- Proven relationship building skills. Promotes cooperation and mutual support to achieve goals.
- Exceptional time and project management ability and highly detail-oriented
- Strong presentation skills
- Experience creating and managing departmental budgets, to achieve annual revenue and expense goals.
- Demonstrated supervisory experience.
- Ability to work in a fast-paced environment and constantly striving toward service improvement and standards of excellence.
- Responds positively to changing business needs and responsibilities. Adapts approach and methods to achieve results.
- Experience creating and managing departmental budgets, to achieve annual revenue and expense goals.

## **COMMUNICATION AND CRITICAL THINKING SKILLS**

- Superior attention to detail, organizational and follow up skills.
- Excellent verbal, written, and interpersonal communication skills.
- Ability to work effectively in a team environment, nurturing cooperative working relationships with diverse groups.

## **SOFTWARE SKILLS REQUIRED**

- Proficient: Microsoft Word, Excel, PowerPoint, Teams, and Outlook

## **EXPECTED TRAVEL**

- Availability for 25% travel per year, including some weekends.
- While performing the duties of this job, employees are regularly required to sit, walk, and stand, talk, or hear, both in person and by telephone, use hand repetitively to manage or operate standard office equipment; reach with hands and arms; and lift to twenty-five pounds.

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## **EQUAL EMPLOYMENT OPPORTUNITY**

CGi is an equal opportunity employer and values diversity. All employment is decided based on qualifications, merit, and business need.