Downloaded from <https://www.velvetjobs.com/job-descriptions/account-operations-manager>

# Example of Account Operations Manager Job Description

Our innovative and growing company is searching for experienced candidates for the position of account operations manager. Thank you in advance for taking a look at the list of responsibilities and qualifications. We look forward to reviewing your resume.

## Responsibilities for account operations manager

* Organizes and communicates internal folder locations and file structures needed to execute each program
* Assists with decisions pertaining to workloads, staffing needs, associate reviews and department policies and procedures
* Provides support to ensure timely and accurate processing of all accounts being converted to advisory, terminating from advisory, or being updated as a result of a change to an existing advisory election
* Functions as a professional resource for others within the department
* With all major stakeholders in practice management, business and delivery management, and global support team management, including Finance, Planning, Human Resources, Marketing (to identify customer wants and needs opportunity assessments and to execute successful sales events)and in general with all personnel at unit level in project and account team meetings
* Manage and lead a dedicated team of meeting managers and coordinators for the delivery of a suite of events
* Ongoing Leadership and Management of support teams and/or coordinator(s) to delivery best results
* Drive change management processes with the assigned partner
* Provide expert direction and guidance to process improvements and establishment of policies
* Overseeing the lifecycle events of all exchange traded and OTC instruments including trade upload, reconciliations, settlements, confirmations, pricing, margin, trade export, reporting and other consequential requirements

## Qualifications for account operations manager

* Experience working with legal documents and complex contractual language
* Comfortable operating as an independent contributor, researching resolution to issues, and reporting findings to the team
* Requires BA/BS degree or equivalent experience
* Ensure delivery of customer IOP objectives
* Develop and implement gap closing initiative, in conjunction with Category Development
* Accurately forecast future sales based on analysis of account and market performance, ensuring S&OP information is regularly updated and communicated