



Example of Account Services Job Description

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Our innovative and growing company is looking to fill the role of account services. Please review the list of responsibilities and qualifications. While this is our ideal list, we will consider candidates that do not necessarily have all of the qualifications, but have sufficient experience and talent.

Responsibilities for account services

- Completes special projects requiring outbound call initiatives for special programs sales, customer notification, and account clean up
 - Utilizes Account management process to identify key customers and to develop specific action plans drive new customer acquisition
 - Develops relationships with multiple buying influences in the customer's organization, including executive level customers, facility managers and purchasing
 - Gathers and validates preliminary information and performs facility walk-through or other requirements
 - Determines project needs, constraints, and responsibilities to meet all of the customer's HVAC maintenance and project requirements
 - Validates the offering with customer
 - Develops and executes an account specific business plan to identify the long-term, mutual support requirements to facilitate a strong, profitable and successful partnership
 - Presents the overall Trane offering conceptually to executive buyers
 - Analyze outside financial firms' statements to validate that assets funding the new PAM Account can be held with our Custodian and align with our written policies to provide a quality onboarding experience for our internal and external clients
 - Responsible for reviewing Retirement Plans
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- Minimum of 3-5 years experience in selling intellectual property / intangible products
- The Account Specialist will be responsible for the strength of the relationship with the customer and for personalising the service offered to each individual customer
- First academic degree in Engineering, MBA – an advantage
- Printing industry experience in customer facing role – 3- 5 years
- Problem solving capabilities, experience in big multi-national company
- Minimum 10 years direct/indirect services sales experience in the Telecommunications field