



## Director of Account Management

### Job Description

#### Basic function

The Director of Account Management is responsible for the management, development, and training of the Account Managers. The Directors of Account Management will work together as a group to determine team and individual goals are executed with their respective team. This will ensure the plans are completed within industry standard compliance deadlines. They will supervise a team of Account Managers assuring MAP Retirement quality and customer satisfaction standards are maintained. The Directors of Account Management will work with other Directors within MAP Retirement to ensure all teams are working as efficiently as possible.

#### Reporting relationships

- Direct report to Managing Partner(s)
- Functions side-by-side with other Directors of Account Management and other Directors

#### Authority

- Assures client satisfaction is achieved by monitoring Account Managers work to be timely and accurate meeting the MAP Retirement standards
- Ensures the reporting of Annual Administration Plan files are properly maintained as well as compliant with government reporting for all clients
- Makes certain all Account Managers have received the tools and training needed to perform their job duties
- Prepare and provide Account Manager Performance reviews

#### Responsibility / Accountability

- Leads, coordinates training, and directs workload of assigned Account Managers
- Assures the quality standards of MAP Retirement are maintained
- Completes bi-annual performance reviews for their Account Management team, with the authority to recommend hiring and termination
- Manage the Account Management Team
- Meet the annual plan administration goals developed with the Managing Partner



## Principle Duties

### Staff Management

- Manage plan processing with Account Managers to include weekly/monthly review
- Set individual expectations based on overall Company goals
- Prepare & Perform Bi-annual Performance Reviews
- Monitor completion of performance goals
- Host individual direct report weekly/monthly team calls to discuss progress
- Coordinate training and development plan for Account Managers; when applicable, seek assistance from other Directors and/or Managing Partner(s)
- Manage paid time off and other appropriate HR policies as outlined in the handbook

### Ongoing Client Management

- Primary contact for issue escalation to resolve client issues
- Maintain a minimum caseload of 5 client plans to keep up with industry knowledge
- Collaborate with other Director of Account Management on Account Manager efficiencies
- Work with Director of Sales to ensure proper assignment of new plans based on experience & criteria in place

### Processing

- Review compliance testing and contribution allocations for the team as needed
- Quality Review a variety of a minimum of 5 valuation reports completed by each Account Manager for accuracy
- Participate with Managing Partner and colleagues in Operational meetings, technology, compliance and/or efficiency projects

The Director of Account Management must be a good communicator, display a positive “can do” attitude, and can multi-task, be patient, and work well on both routine & non-routine activities. They must be an outstanding time and people manager, can work strategically thinking through issues and tactically by executing activities. They need to work independently, as a team player, as both a leader and manager.