

## **RocketDocs, Inc**

### **Position Specification**

### **Account Manager**

#### **The Company**

RocketDocs is a Software-as-a-Service (SaaS) software company that serves financial services, healthcare, technology and other B2B companies. RocketDocs created the RFP (request for proposal) market over twenty years ago and enjoyed stable growth and success partnering with many top Fortune 100 companies. Our valued customers want to respond to their customers with speed and accuracy by using tools that help manage content and create information assets. We recently launched a new platform that meaningfully enhances our functionality and provides a platform to grow into more expansive services in Sales Enablement and beyond.

Our primary office is in Baltimore (HQ in Harbor East) though we have employees located around the country and overseas. Employees in Baltimore are able to come into the office periodically on a voluntary basis though we have fully adapted to the work from home world in which we live. We have already successfully onboarded several employees during these most interesting times.

We value everyone's voice and opinion (regardless of what hat you wear) as we search for best approaches. We equally value the need to come together once the decision is made and attack the projects as one team where we support each other.

#### **The Position**

Ideally located near Baltimore Maryland, though working from home as needed/required, this position reports to the Vice President of Revenue. The Account Manager will "own" a subset of our enterprise customers and will be responsible for deeply understanding their needs, ensuring reliable delivery of our platform products and services, seeking revenue growth opportunities, expanding our footprint more broadly in the enterprise, and ensuring customer satisfaction. The Account Manager will ultimately be measured on retention, revenue growth, and customer satisfaction.

RocketDocs recently launched a new version of our platform and we are migrating customers, as well as adding new customers to the new product. In addition to the responsibilities below, the Account Manager will need to communicate the benefits of the new platform (along with features) and guide customers to migrate as soon as practical.



### **Responsibilities**

- Be the primary point of contact and build long-term relationships with customers, simply to own your 'business' and drive results
- Identify and close new business opportunities within current customers
- Develop a trusted advisor relationship with key accounts, customer stakeholders and executive sponsors
- Ensure the timely and successful delivery of our solutions according to customer needs and objectives
- Clearly communicate progress on quarterly initiatives to internal and external stakeholders
- Forecast and track key account metrics
- Update job knowledge by participating in educational opportunities; reading professional publications; maintaining personal networks; participating in professional organizations
- Monitor and analyze customer's usage of our product
- Responsible for working with the Sales team to onboard and integrate new clients and developing existing client relationships
- Be a champion for your assigned customers and liaise between the customer and internal teams

### **Experience / Qualifications / Requirements / Core Competencies**

- Proven account management or other relevant experience
- Ability to manage multiple projects simultaneously and be diligent at follow up
- Demonstrated ability to communicate, present and influence credibly and effectively at all levels of the organization, including executive and C-level
- Experience in delivering client-focused solutions based on customer needs
- Proven ability to manage multiple projects at a time while paying strict attention to detail
- Say what you are going to do, and do what you say
- Excellent listening, negotiation and presentation skills
- Demonstrated competitive spirit
- Self-motivated and able to thrive in a results-driven environment
- Critical thinking and problem-solving skills
- Expert at Microsoft Office Suite, Google Apps and Salesforce.com
- Bachelor's Degree in appropriate field of study or equivalent work experience
- 3+ years of similar experience

### **The successful candidate will possess the following Attributes, Qualities and Characteristics:**

- Honesty, integrity, and ethics. An absolute – the candidate must be trustworthy.
- Be a team player; we value everyone's voice but require unity as we face customers.
- An enthusiastic, high-energy team player with a "sales attitude" who is accustomed to a fast-paced environment.
- Desire to compete and win
- Excellent listening skills
- Eagerness to learn



**Travel**

- Not necessary during the current pandemic, but this position could require travel at some point in the future

**Work Environment and Physical Demands**

- General office environment in Baltimore, MD though all employees are currently largely working from home. No special physical demands required.

**EEO Statement**

RocketDocs is committed to providing Equal Opportunity in Employment, to all applicants and employees regardless of, race, color, religion, sex, age, national origin, military status, veteran status, handicap, physical or mental disability, sexual orientation, gender identity, genetic information or any other characteristic protected by law.