Business Development Rep (BDR)/Customer Account Manager
Responsibilities & Expectations

This is a role that wears several hats at the same time, which can require strong multi-tasking and organizational skills. Outlined here are some high-level expectations for the different types of responsibilities.

SALES

- Administrative
  - Regular status meetings
  - Maintain lead status in tracking systems
  - Document sales activities in CRM
- Sales Lead Management
  - Screen/assess purchased leads for quality and relevance
  - Assign to sales resource at appropriate time (Hand off call)
  - Return to source for replacement
  - Place into nurturing queue and nurture when appropriate
  - Register with software vendor(s)
  - Audit active sales processes
  - Begin business assessment document at appropriate time
  - Complete or assist with RFP’s when needed
- Work with lead generation sources to refine target markets
- Work alongside sales agent relationships when appropriate
- Support sales reps when needed
- Research collateral for sales process
- Manage reference relationships and prepare them for calls

MARKETING

- Be involved in recommendations for marketing strategies with new opportunities
- Review existing corporate messaging when appropriate, and communicate with relevant team members

NEW BUSINESS DEVELOPMENT

- Work with the team as they develop business development programs for new opportunities.
- Support existing programs where needed (like migrations, partners, vertical solutions, etc.)
- Support and assist with the nurturing program for lead pipeline
- Identify new business opportunities
- Network within the vendor/partner community

CUSTOMER ACCOUNT MANAGEMENT (CAM)

General

- Permanent customer contact at Encompass
- Typically we would transition a customer from a PM to a CAM approximately a month after go-live

- A non-billable role
- Generate revenue and maintain reference accounts for ESI
- A CAM would step back when a project engages, and pass accountability for that project to the PM, although they would remain available for escalations, and as a contact point for non-project issues.

Key tasks

- Communications with customers around dollars and cents
  - May include annual rate increases
  - May include conversations about specialty services that require their own engagements and rates
  - May include constructing, and discussing letters of engagement/SOW's – Operations can provide templates
- Nurture activities
  - Monthly calls to check on potential projects when no active projects in place - set a calendar reminder
  - Weekly or bi-weekly calls to review open projects and tasks with customer as needed when there are active engagements, and no PM is in place
  - Work with operations on any exceptions - late deliveries, overruns, defects
- System activities
  - Use Connectwise to see all active tasks/resources for a customer
  - Ensure resources are assigned to tasks, working with Op's
  - Close out any tasks that are accepted, if no PM is in place
- Strategic responsibilities
  - Quarterly/yearly meetings with client to review business strategic direction
  - Work alongside marketing to communicate and sell ESI product and service offerings including upgrades, managed services and 3rd party products
  - Facilitate communications and escalations with Epicor, including revenue recognition for add on sales
- Build existing customer reference database and success stories
- Attend vendor and user events as appropriate

TRAINING POSSIBILITIES

- Attending vendor partner training events
- Online webcasts provided by our vendors and/or webex's on technology
- Review of current sales & marketing materials
- Books/online resources for industry knowledge
- Shadowing/Time with myself, my business partner, CAM, channel contacts and other key staff
- Visiting local customers