

**Job Title:** Account Executive - Marketing

**Job Code:** AE

**Reports To:** Group Manager

**LSA Status:** Exempt

**Department:** Marketing

**Division:** CDR

**Summary:** Develops and executes direct-marketing fundraising campaigns for nonprofit organizations and charities by performing the following duties.

**Essential Duties and Responsibilities** include the following. Other duties may be assigned.

Responsible for the development of direct-marketing plans and budgets.

Develops and implements strategies to maintain and/or expand fundraising programs for assigned clients.

Interacts with the client to understand the client's overall objectives and requirements.

Defines direct-mail marketing programs to support client message and quality standards.

Manages contracts with and coordinates activities of off-site agencies, database suppliers, list brokers, and vendors.

Identifies target market segments by demographic and/or psychographic characteristics.

Conducts test programs to measure effectiveness of media, list, creative, and offer.

Develops offer(s), target revenues, and response rates based on list quantities and costs.

Forecasts the cash flow (donations & mailing costs) for assigned clients.

Tracks and analyzes results of test marketing programs and recommends programs to be expanded.

Researches postal requirements and mail sorting techniques to obtain maximum postal discounts.

Provides reports on the budget and donor activity for each assigned client.

Reviews and evaluates market research to use in forecasting future direct-marketing needs.

Contacts clients on a regular basis to maintain account relationship, advise of new service offerings, and obtain feedback on service.

Builds and maintains positive client liaison relationships through preparation and participation in client meetings. Also, maintains positive trusting relationships through on-site visits and meetings, and gathers research and pertinent information for clients.

Serves as a point of contact for issues or activities that the client encounters.

Expedites the resolution of client problems/complaints.

Prepares and conducts presentations for clients and prospective clients.

Participates in trade shows/conferences by representing CDR and sharing information on company services.

Shares ideas and client needs throughout all phases of client life cycle (plan, design, integrate, implement, manage).

Contributes to the quarterly and annual business forecasting by providing account trends and sharing future client needs.

Develop detailed production schedule for clients.

Monitor the status of assigned client work within the agency. Reviews, analyzes and evaluates project output on behalf of internal/external client, ensuring quality standards.

### **Competency:**

To perform the job successfully, an individual should demonstrate the following competencies:  
Analytical - Synthesizes complex or diverse information; Collects and researches data; Uses intuition and experience to complement data; Designs work flows and procedures.

Problem Solving - Identifies and resolves problems in a timely manner; Gathers and analyzes information skillfully; Develops alternative solutions; Works well in group problem solving situations; Uses reason even when dealing with emotional topics.

Project Management - Develops project plans; Coordinates projects; Communicates changes and progress; Completes projects on time and budget; Manages project team activities.

**Technical Skills** - Assesses own strengths and weaknesses; Pursues training and development opportunities; Strives to continuously build knowledge and skills; Shares expertise with others.

**Customer Service** - Manages difficult or emotional customer situations; Responds promptly to customer needs; Solicits customer feedback to improve service; Responds to requests for service and assistance; Meets commitments.

**Interpersonal** - Focuses on solving conflict, not blaming; Maintains confidentiality; Listens to others without interrupting; Keeps emotions under control; Remains open to others' ideas and tries new things.

**Oral Communication** - Speaks clearly and persuasively in positive or negative situations; Listens and gets clarification; Responds well to questions; Demonstrates group presentation skills;

Participates in meetings.

**Team Work** - Balances team and individual responsibilities; Exhibits objectivity and openness to others' views; Gives and welcomes feedback; Contributes to building a positive team spirit; Puts success of team above own interests; Able to build morale and group commitments to goals and objectives; Supports everyone's efforts to succeed; Recognizes accomplishments of other team members.

**Written Communication** - Writes clearly and informatively; Edits work for spelling and grammar; Varies writing style to meet needs; Presents numerical data effectively; Able to read

and interpret written information.

**Change Management** - Communicates changes effectively; Builds commitment and overcomes resistance; Prepares and supports those affected by change; Monitors transition and evaluates results.

**Leadership** - Exhibits confidence in self and others; Inspires and motivates others to perform well; Effectively influences actions and opinions of others; Inspires respect and trust; Accepts feedback from others; Provides vision and inspiration to peers and subordinates; Gives appropriate recognition to others; Displays passion and optimism; Mobilizes others to fulfill the vision.

**Quality Management** - Looks for ways to improve and promote quality; Demonstrates accuracy and thoroughness.

**Visionary Leadership** - Displays passion and optimism; Inspires respect and trust; Mobilizes others to fulfill the vision; Provides vision and inspiration to peers and subordinates.

**Business Acumen** - Understands business implications of decisions; Displays orientation to profitability; Demonstrates knowledge of market and competition; Aligns work with strategic goals.

**Cost Consciousness** - Works within approved budget; Develops and implements cost-saving measures; Contributes to profits and revenue; Conserves organizational resources.

**Diversity** - Demonstrates knowledge of EEO policy; Shows respect and sensitivity for cultural differences; Educates others on the value of diversity; Promotes a harassment-free environment.

**Ethics** - Treats people with respect; Keeps commitments; Inspires the trust of others; Works with integrity and ethically; Upholds organizational values.

**Organizational Support** - Follows policies and procedures; Completes administrative tasks correctly and on time; Supports organization's goals and values; Benefits organization through outside activities; Supports affirmative action and respects diversity.

**Strategic Thinking** - Develops strategies to achieve organizational goals; Understands organization's strengths & weaknesses; Analyzes market and competition; Identifies external threats and opportunities; Adapts strategy to changing conditions.

**Adaptability** - Adapts to changes in the work environment; Manages competing demands; Changes approach or method to best fit the situation; Able to deal with frequent change, delays, or unexpected events.

**Attendance/Punctuality** - Is consistently at work and on time; Ensures work responsibilities are covered when absent; Arrives at meetings and appointments on time.

**Dependability** - Follows instructions, responds to management direction; Takes responsibility for own actions; Keeps commitments; Commits to long hours of work when necessary to reach goals; Completes tasks on time or notifies appropriate person with an alternate plan.

**Initiative** - Volunteers readily; Undertakes self-development activities; Seeks increased responsibilities; Takes independent actions and calculated risks; Looks for and takes advantage of opportunities; Asks for and offers help when needed.

**Innovation** - Displays original thinking and creativity; Meets challenges with resourcefulness; Generates suggestions for improving work; Develops innovative approaches and ideas; Presents ideas and information in a manner that gets others' attention.

**Judgment** - Displays willingness to make decisions; Exhibits sound and accurate judgment; Supports and explains reasoning for decisions; Includes appropriate people in decision-making process; Makes timely decisions.

**Motivation** - Sets and achieves challenging goals; Demonstrates persistence and overcomes obstacles; Measures self against standard of excellence; Takes calculated risks to accomplish goals.

**Planning/Organizing** - Prioritizes and plans work activities; Uses time efficiently; Plans for

additional resources; Sets goals and objectives; Develops realistic action plans.

**Professionalism** - Approaches others in a tactful manner; Reacts well under pressure; Treats others with respect and consideration regardless of their status or position; Accepts responsibility for own actions; Follows through on commitments.

**Quality** - Demonstrates accuracy and thoroughness; Looks for ways to improve and promote quality; Applies feedback to improve performance; Monitors own work to ensure quality.

**Quantity** - Meets productivity standards; Completes work in timely manner; Strives to increase productivity; Works quickly.

### **Qualifications:**

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

### **Education/Experience:**

Person must have completed at least 2 years of college-level education. Requirements for this position are BA/BS degree plus 3 years of relevant experience; or equivalent combination of experience and education (but at least 2 years of college).

### **Language Ability:**

Ability to read and interpret documents such as safety rules, operating and maintenance instructions, and procedure manuals. Ability to write routine reports and correspondence. Ability to speak effectively before groups of clients or employees of organization.

### **Math Ability:**

Ability to add, subtract, multiply, and divide in all units of measure, using whole numbers, common fractions, and decimals. Ability to compute rate, ratio, and percent and to draw and interpret bar graphs.

### **Reasoning Ability:**

Ability to solve practical problems and deal with a variety of concrete variables in situations where only limited standardization exists. Ability to interpret a variety of instructions furnished in written, oral, diagram, or schedule form.

### **Computer Skills:**

To perform this job successfully, an individual should have knowledge of Word Processing software; Spreadsheet software; Internet software and Database software.

### **Certificates and Licenses:**

No certifications needed.

### **Work Environment:**

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

The noise level in the work environment is usually quiet.

### **Physical Demands:**

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is occasionally required to stand; walk; sit; use hands; talk; and listen.