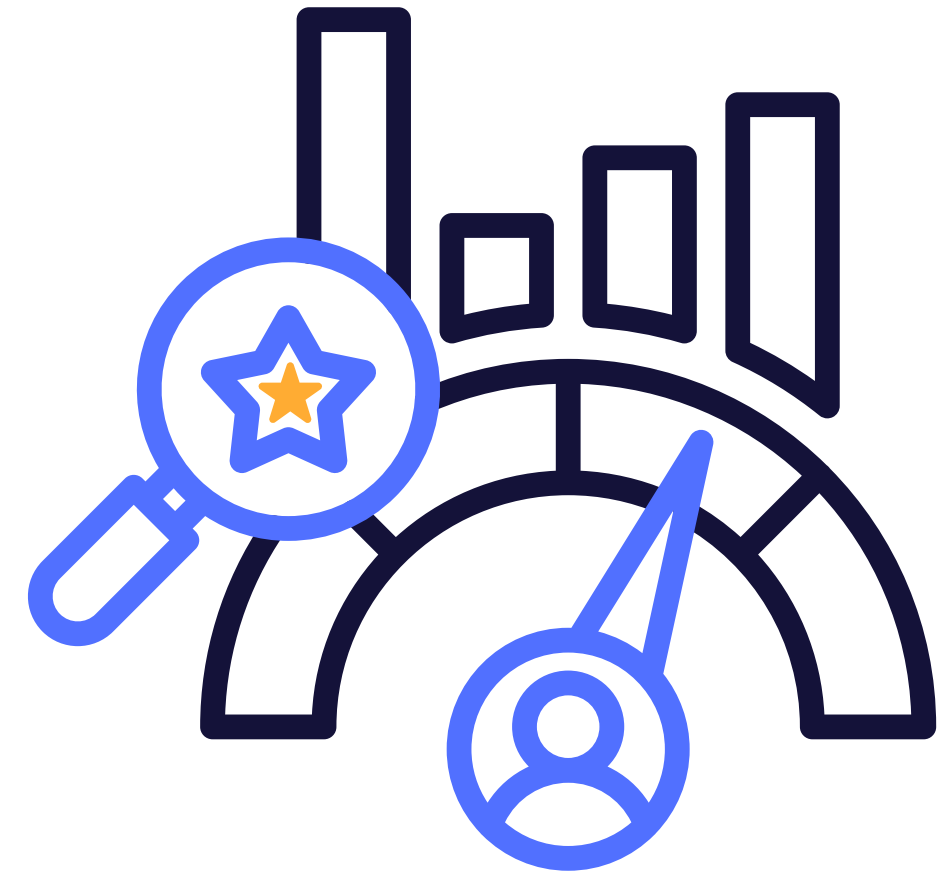


# MEASURING **SUCCESS** IN THE ACCOUNT MANAGER ROLE



# Performance Reviews

## Onboarding Surveys

At 30, 60 and 90 days, you'll receive an survey via email prompting you to evaluate what additional training or resources are needed to succeed in your role.

## Performance Reviews

Team members meet with the agency's COO and HR Director at 60 days, 90 days, 6 months and then annually to review performance evaluations, identify training/resource needs and discuss goals for professional development.

- ✓ 30-Day Onboarding Survey  
via email survey
- ✓ 60-Day Onboarding Survey  
via email survey
- ✓ 60-Day Performance Review  
with COO & HR
- ✓ 90-Day Onboarding Survey  
via email survey
- ✓ 90-Day Performance Review  
with COO & HR
- ✓ 6-Month Performance Review  
with COO & HR
- ✓ Annual Performance Review  
with COO & HR

# Performance Review Structure



## CORE CAPABILITY

Ties into our agency core values and the overall qualities needed to succeed on the Jairus team



## ROLE EXPECTATION

The high-level responsibilities and requirements for each role at Jairus



## PERFORMANCE METRIC

The criteria we use to measure success for each role expectation at Jairus

CORE CAPABILITY	ROLE EXPECTATIONS	PERFORMANCE METRICS
<p><b>Team player:</b> Makes a committed and conscious effort to ensure other team members are set up for success as projects move through the agency</p>	Follows a professional code of conduct that aligns with agency core values and processes.	Is prompt for meetings, dressing professionally and with cameras on for client and internal meetings unless otherwise discussed with leadership.
	Is prompt, professional and effective in communication with clients and internal team members, and is responsive to emails and slack messages and available for meetings during core business hours	Upholds our agency core values, demonstrating those values through attitude and work output.
	Makes a committed and conscious effort to ensure other team members are set up for success as projects move through the agency	Respond to urgent slack messages that may effect the client relationship or hold up client work within one hour.
	Connects weekly with assigned Account Director for collaboration, mentorship and coaching	Work with AD to facilitate a response to client emails in the same business day.
	Demonstrates an awareness of agency profitability in executing client deliverables	Ensures all client-related communication is shared in the appropriate client channel (vs. in direct messages).
		Develops an understanding of each role within the agency to help facilitate more efficient and effective project execution.
		Ensures clients' project briefs are thorough and all necessary information is conveyed so other team members can successfully complete their tasks and rounds of revisions are minimized.
		Pro-actively seeks feedback for growth and development opportunities from the assigned Account Director(s), meeting with them regularly (at least 1x monthly) for collaboration and role coaching
		Actively initiates and effectively follows direction and guidance from the assigned Account Director(s) to support the execution of client strategy.
		In collaboration with the assigned AD(s), recommends client deliverables that increase or maintain client investment with the agency, avoiding recommendations that decrease agency fees.

CORE CAPABILITY	ROLE EXPECTATIONS	PERFORMANCE METRICS	
<p><b>Pace:</b> The ability to get work done quickly while still maintaining accuracy</p>	<p>Ensures client deliverables adhere to expected timelines, adhering to task deadlines in our project management platform.</p>	<p>Seeks approval from the project manager when projects require faster turnaround than our standard turnaround times (before confirming the timeline with clients).</p> <p>Logs all billable time daily in project mgt. platform to the correct client, correct project and correct task, ensuring hours logged accurately reflect the time a task required and noting issues that occurred if the hours logged exceed the original budgeted hours for that task.</p> <p>Adheres to the estimated task times in our project management platform and provides an explanation in the time log when a task takes substantially longer (more than 10% longer than estimated).</p>	
	<p>Minimizes the need for rush projects by quickly and efficiently submitting project requests and facilitating briefs and proof tasks (without bumping out task due dates).</p>	<p>Ensure new project requests are submitted within 1 business day of client request or scope of work approval.</p>	
		<p>Ensures project briefs are submitted within 2 days of project request (unless additional information is needed from the client)</p>	
		<p>Ensures proofs are reviewed within 1 business day of task assignment and promptly passed forward for revisions or the next step in development.</p>	
		<p>Adheres to all standard Account Team timelines as outlined here, and guides their Account Managers and Account Coordinators to do the same.</p>	
	<p><b>Problem-solving</b> The ability to gather data and make a sound decision</p>	<p>Communicate client needs, project changes and other relevant information to other account team and key support team members, as well as leadership when required.</p>	<p>Meets regularly with your account director(s) to ensure alignment on project deliverables/team responsibilities.</p>
			<p>Ensures project- and task-related information is shared via the correct task in project mgt. platform, keeping all relevant team members up-to-date on critical details.</p>
<p>Keeps the traffic coordinator and account coordinator in the loop on project needs and timelines, working closely with that role to prioritize work and ensure projects are set up correctly in Teamwork.</p>			
<p>On behalf of clients, accurately convey project vision for content/ graphic design/ web development needs to ensure high-quality deliverables, by successfully utilizing project briefs.</p>			

CORE CAPABILITY	ROLE EXPECTATIONS	PERFORMANCE METRICS
<p><b>Client Knowledge:</b> Understanding the client's business, their competitors, and the overall market</p>	<p>Sufficiently understand your clients' industry, business model and products/services to lead strategy and guide the clients' decision-making when it comes to sales/marketing efforts.</p>	<p>Regularly researches industry trends and follows industry-/client-related news.</p>
		<p>Alerts/educates the rest of the team to important industry trends and client news that may impact marketing efforts.</p>
		<p>Has reviewed and demonstrates an understanding of the agency's industry-related resources, including The Healthcare Stakeholders Playbook, the Reimbursements &amp; Claims Playbook and the Medical Device Regulatory Requirements Playbook</p>
<p><b>Insights:</b> The ability to inject valuable thoughts/perspectives into a marketing conversation</p>	<p>Support efforts to optimize client performance - contributing to strategy and performance discussions while monitoring regular ROI insights from the client, including lead-to-sale conversion data and other client feedback regarding our efforts. Adhere to results reporting SOPs, supporting your AD(s) as the agency champion in continually promoting our results/successes to the client.</p>	<p>Supports development of monthly or bi-weekly results reports to clients, analyzing data and updating client presentations for AD review at least 2 business days prior to client meetings.</p>
		<p>Support development of quarterly results and strategy reviews with clients, ensuring accurate results data is evaluated and collaborating with AD(s) to present key findings and recommendations based on that data.</p>
		<p>Participates in monthly performance/strategy meetings with internal team members, utilizing our Account Health scale.</p>
		<p>Proactively identifies opportunities to improve client performance and/or solicits team member input toward that goal.</p>
		<p>Ensures weekly client benchmark reports are completed and posted in client Slack channels, as outlined in our Campaign Performance Playbook.</p>
		<p>Understand social/digital platforms, including advertising platforms, CRMs, email platforms to a level that allows the Account Manager to support strategy, evaluate campaign results and move projects forward effectively.</p>
	<p>Can navigate Google Ads, Bing Ads and Ad Roll platforms to ensure 1.) the correct campaigns are running and are targeting the right audiences and 2.) review campaign results.</p>	
	<p>Understands industry/client benchmarks for and utilizes them in analyzing campaign results.</p>	
	<p>Is capable of logging into clients' email platforms to review campaigns, upload audiences and analyze results and can navigate the clients' CRM platforms to review results and provide support as appropriate based on the client's SOW.</p>	

CORE CAPABILITY	ROLE EXPECTATIONS	PERFORMANCE METRICS
<p><b>Accuracy:</b> The ability to get things right, the first time</p>	<p>Ensure adherence to projects and timelines outlined in the SOW, while monitoring client hours and account profitability</p>	<p>Ensure all projects in the Statement of Work are completed at the frequency stated.</p>
		<p>If minor SOW variations occur, either at client request or our recommendation, collaborate with AD(s) to ensure those changes are noted on the SOW with an explanation via a comment.</p>
<p><b>Stick-to-itiveness:</b> The ability to take things through to completion, either directly or through ensuring others get their jobs done</p>	<p>Understand and follow internal processes and workflows, appropriately utilizing our project management system (Teamwork) to ensure delivery of client work on time and on budget.</p>	<p>Checks project mgt. platform task list daily and ensure tasks assigned to you are moved forward in a timely manner, going the extra mile to ensure the next person in line is set up for success.</p>
		<p>Know project statuses for all client work – where the project stands, when a proof or final files are expected - and coordinates with Project Manager to ensure the highest-value activities are prioritized by the team.</p>
		<p>Jairus Account Managers should support a portfolio of clients with at least \$70,000 in monthly run rate (agency retainer fees); typically 8-10 clients, dependent on client size, within 9 months of onboarding, under the leadership of Account Director(s).</p>
<p><b>Accountability:</b> Takes full ownership of the account manager role and related deliverables</p>	<p>Cultivates a position of leadership with both clients and internal team members, serving as the first point of contact for both opportunities and challenges related to client deliverables and results</p>	<p>Teamwork project due dates are accurate (updated when timelines change during weekly PM meetings), and client deadlines are met.</p>
	<p>Demonstrates an understanding of agency profitability and prioritizes that profitability in managing and growing client relationships.</p>	<p>Takes ownership of all AM deliverables, ensuring tasks are moved forward in alignment with clients goal and strategy as well as recognizing and pro-actively raising a flag on challenges.</p>
		<p>Partners with AD(s) to recommend client deliverables and strategy that increase or maintain client investment with the agency, avoiding recommendations that decrease agency fees.</p>
		<p>Supports agency profitability by monitoring client/project hours monthly, ensuring that actual hours are below 110% of scoped hours and notifying leadership team quarterly of overages/underages of greater than 10%.</p>

# Up Next:

A deep dive into the Account Manager and Account Director relationship at Jairus

