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| **Position Title:** | **Account Coordinator**  |
| **Reports to:** | **Customer Care Manager / Head of Sales (Labels)** |
| **Direct Reports:** | **None** |
| **Financial Delegations:** | **None** |
| **Division:** | **insignia**  | **Dept:** | **Internal Sales** |
| **Location:** | **Brisbane / Melbourne** | **Date:** | **01/07/11** |

# Company Overview

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| insignia is a national labelling and coding business with a strong focus on providing valued solutions to its customers. Part of the Winson Group, insignia has an unwavering passion to help Australian businesses compete. Our values, our people, our products and our services have been the platform for 50 years of being an indispensable partner for our customers. Our Promise: * Market leading products
* Nationwide coverage
* Expertise across all industries
* Delivered with personable service and support, diligence and professionalism

Group Cores Values: Honour; Ownership and Commitment; Change for Strength; Diligence |

# Position Overview & Organisational Requirements

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| **Position Summary:**The position of Account Coordinator works to retain and grow customers in their territory through effective management of the on-going client relationship. The Account Coordinator collaborates with the Key Account Manager in their branch and with other departments for their region to provide relationship, data and contract management services to established and newly acquired customers.**Organisational Requirements:*** All positions within the Winson Group will support the achievement of our Mission.
* When dealing with our colleagues, customers and the community, all employees are required to act in accordance with the company’s stated values and behaviours, customs and practices.
* Employees are required to comply with all relevant legislation, laws, regulations, standards, codes and the Group’s policies and procedures.
* Employees are required to take reasonable care of their own health and safety and the health and safety of other people, including people working under their supervision or direction, in accordance with the Workplace Health and Safety Legislation, relevant to each state.
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# Key Responsibilities

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| * Display behaviours consistent with the stated Winson Values

**Relationship Management*** Conduct scheduled customer outbound calls for the purpose of gathering information regarding accounts, and assessing purchasing patterns to prompt customers to order.
* Utilise various marketing programs/processes to further enhance and develop the “customer intimacy” aspect of our business proposition.
* Within outbound calls, build relationships with key contacts within customer accounts including personnel responsible for Labels, Domino product consumables and ongoing technical service.

**Data Management*** Maintain accuracy and currency of the data in the contact card portion of Navision.
* Ensure the interaction log is current and accurate and relevant files and documents are attached to the card and stored in other locations, if necessary.
* Collection of data from all customer contacts to ensure database files and profiles in Navision are accurate and current.
* Ensure Microsoft CRM is kept up to date with key business contacts, leads and opportunities.

**Agreement/Contract Management*** Assist Key Account Managers with the maintenance, currency and accuracy of all contracts/agreements that are in place with customers in the assigned portfolio.
* Perform an account review process for every customer agreement.
* Ensure new contracts are rolled out and documented correctly – including sign off by the appropriate manager and relevant representative.
* Maintain contract documentation and ensure contract terms and conditions are fulfilled (e.g. pricing, reporting, renewal, delivery etc.).
* Ensure that insignia personnel and departments involved in the delivery of contract obligations are familiar with the terms and understand the requirements.

**Opportunity Identification*** Develop an understanding of the businesses within the assigned portfolio with the aim of identifying relevant business opportunities within the accounts.
* Record identified opportunities correctly within CRM and communicate them to relevant teams for processing.
* Acquire and maintain a sound level of product knowledge in order to successfully evaluate and identify potential business opportunities.
* Follow up on all opportunities gained to ensure service level is met and customer has a satisfactory outcome.

**Issue Ownership and Resolution*** Liaise with required personnel across departments to drive solutions for all customer issues, including New Business Development, System Sales, Customer Care, Technical Support, Production, and Accounts.
* Liaise with the client regarding their options and keeping them informed at which stage the resolution process is at.

**General*** Work with the Key Account Managers (KAM) and Business Development Managers (BDM) of assigned branch, to ensure customer service levels are always met.
* Contribute to all regular department meetings and ensure all reports are completed on time.
* Back up the Customer Care team with regards to order processing and phone support where required
* Meet all KPI's as determined by Senior Management.
* Interact with all business areas to achieve outcomes as outlined by the business objective.
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# Key Competencies/Experience

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| **Key Competencies*** Ability to work and communicate with a broad range of people, both internally and externally.
* Strong skills in communication, administration and time management.
* Knowledge of principles and processes for providing customer services. This includes customer needs assessment, meeting quality standards for services, and evaluation of customer satisfaction.

**Experience*** 1-2 years’ experience in a sales or customer service role, within an industrial environment.
* Proven experience in working with client database systems and MS Office applications.
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# Key Performance Indicators

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| * Behaviours are aligned to Winson’s stated Values and Behaviours
* Conduct 25 outbound telephone meetings with customers each week.
* Ensure Aux In time on insignia phones hits standard.
* Completion of call lists as distributed by Customer Care Manager / Head of Sales (Labels).
* Ensure special pricing arrangements and quotations are correctly loaded into the system.
* Maintain and update customer records in Navision within 24 hours.
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# Qualifications

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| * None specific
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# Mandatory Criteria

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| * Open C class vehicle license
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# Specific Requirements of the Position

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| * Availability to attend 1 weekend conference per year
* Availability to work before/after hours to accommodate external state/territory daylight savings and public holidays, as required.
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# Key Stakeholders

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| **Internal*** Customer Care Manager
* Head of Sales (Labels)
* Account Management team
* Customer Care team
* State/territory BDMs
* Management
* insignia staff

**External** * Customers
* Suppliers
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# Authorisation

# Please sign to confirm that this Position Description has been discussed by both parties.

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| Employee Name & Signature |  | Date |  |
| Manager Name & Signature |  | Date |  |

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| **Date** | **Reviewed By** | **Comment** |
| 10/11/09 | S Young | New Position Description |
| 05/08/14 | A McPherson | PD updated to report to Customer Service Manager. |
| 07/05/15 | R Watson | Updated format, content and removed org chart. |
| 21/10/16 | M Mooyman and S McCalman | Updated to include new reporting line, position title and changes to departments in line with structural review.  |
| 20/02/17 | S McCalman | Updated to include Values and Behaviours; added Melbourne to Location.  |
| 22/03/18 | S McCalman | Updated reporting manager and company overview.  |
| 05/12/18 | S McCalman | Updated reporting managers. |