

JOB DESCRIPTION & PERSON SPECIFICATION

Account Manager

(Key Accounts team)

This is a full time, office-based role, in the centre of Hook in Hampshire. It requires an organised and engaging professional with senior client management and project management skills.

The Key Accounts Account Manager will be responsible for the management and project delivery of a portfolio of high profile contracts to deliver Occupational Therapy services to our customers including NHS trusts & local authorities, charities and other key sectors we serve.

This role will be customer relationship orientated, able to nurture relationships and go the extra mile to foster an environment that genuinely values our clients and manages their expectations throughout the project lifecycle to ensure successful delivery of well managed projects.

Applications & enquiries

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Context

The Account Manager will be in charge of service delivery, not sales, and therefore the key skills needed for the role are project management, organisational capabilities, stakeholder influence and relationship development. Formal project management qualifications whilst desirable is not required – far more important is intuitive project planning/management capabilities underpinned by autonomous problem solving and a strong locus of control.

They will have 5 key stakeholder groups: the customer who commissions the projects, the service user (the person being assessed and treated), the team of Occupational Therapists delivering the services, the Account Manager's project administration team that supports them internally, the business development team who negotiates the contracts and defines the project parameters. Key to the success of this role is the effective coordination and control of these stakeholder groups.

This role allows for different levels of experience and capability through a remuneration scheme that rewards based on the size of portfolio under their management, offering equal opportunity for career advancement and financial reward for those keen to expand their portfolio beyond the base level expectations.

Our Company ethos

- We make clients & potential clients feel understood and provide sound professional advice
- We are friendly & caring, but always remain professional
- We are socially responsible – if there is a better option for a prospective client then we say so
- We are client-focused and want to ensure our clients feel they are in safe hands
- We are driven and go the extra mile if that is what is needed to keep a client happy.

The personal skills and temperament of the successful candidate will be of great importance. We pride ourselves on being a caring and friendly, but professional company. We believe the growth and success of our business to date is directly attributable to ensuring these values are at the core of everything we do. It is therefore essential that our Account Manager, one of our primary points of contact with our clients, is able to constantly and consistently uphold these values, and believe in them in the same way we do.

Details of the role

The successful candidate will be responsible for a portfolio of customers with a variety of projects delivering occupational therapy and related services. They will lead on the planning, delivery, monitoring, and completion. This role will report to the Operations Director (Key Accounts).

Mobilisation and planning:

- Early engagement with the Business Development team during contacts negotiations to influence project parameters.
- Working alongside the Mobilisation Manager to prepare projects for launch and engage with key stakeholders
- Establish service scope in detail and reaffirm with project delivery teams across all stakeholders (customer's "on the ground" team and therapist team).
- Work in conjunction with the Mobilisation Manager on systems set up and contractual obligations (issuing Statements of Work) for the therapist team.

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- Interpretation and distillation of contractual requirements in order to communicate processes and pathways to all delivery team stakeholders (customer, therapists, internal project admin staff).
- Preparation and presentation of project specific training materials.

Project delivery:

- Managing the customer
 - Setting & enforcing project scope and where necessary managing contractual variations with business development
 - Overall responsible for relationship and task management between project team and customer
 - Pro-actively creating and maintaining the relationship (primary point of contact and customer's "go to person" post mobilisation).
 - Keeping the customer updated with progress and identifying any issues and plans for mitigation
 - Be the initial point of escalation for customers, investigating and managing complaints as required.
 - Lead on contractual customer monitoring/review meetings, KPI management, report creation and liaison with customer outside of the scope of the project admin team.
 - Preparation and delivery of project wrap up meetings.
- Managing the therapy team
 - Build and nurture relationships with therapist team
 - Setting & enforcing project scope – including empowering the therapist to manage the project scope with the service user (person they are assessing/treating)
 - Project specific training & familiarisation – setting up the project for success
 - Working with the Mobilisation Manager and Resourcing team to effectively onboard an induct therapists onto projects.
 - Pro-active check-ins with therapy team until capability on projects is proven (to avoid reactive problem solving by challenging the team on their progress/capability to achieve project goals.)
 - Monitor and manage the performance of the therapist team – where necessary escalate to therapist network team
 - Identify, record and mitigate risks associated with therapist team.
- Managing the internal project admin team
 - Line management of Project Admin staff fully dedicated (or primarily dedicated) to the Account Manager.
 - Training and mentoring Project Admin staff on their role and delivering project specific training
 - Providing support and day to day direction
 - Daily task assignment and coordination of resources to achieve project objectives according to priorities (QA of reports and any other appropriate tasks within the capability and reasonable expectation of the project admin role.)
 - Upskilling admin team to increase breath of tasks and support they can provide to the Account Manager on their projects
 - Careful monitoring and checking of delegated responsibilities.
- Finance and billing responsibilities
 - The Account Manager is responsible for the correct assignment of the fees on all cases/projects (this task can be delegated, but remains the responsibility of the Account Manager and therefore must only be delegated according to the judgement of the Account Manager with carefully monitoring and stringent training)
 - The Account Manager is responsible for approval of fees (this task can be delegated, but remains the responsibility of the Account Manager and therefore must only be

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- delegated according to the judgement of the Account Manager with carefully monitoring and stringent training)
- Client billing and invoice creation/sending will be the responsibility of the Account Manager for the projects under their management and cannot be delegated.
- The Account Manager will be responsible for create ad hoc financial reports as they require for the management of their projects, or as required by the business/customer.
- **Monitoring, governance and systems**
 - Prepare for weekly governance meetings to provide progress on projects, to ensure all risks are identified and provide transparency on the health and performance of each project under the Account Manager's management.
 - Weekly (or as otherwise agreed) governance meetings with Operations Director to present project updates.
 - As necessary liaise with the business development team on development of new opportunities or extended project value, variations to agree processes, risks to delivery capabilities or timescales, potential breaches of contract terms, commercial/contractual challenges etc.
 - Make commercial awareness intrinsic to day to day operations: looking for efficiencies or highlighting/rectifying inefficiencies, keeping a strong focus on achieving monthly billing targets for each project and understanding what factors effect this and how to manage them.
 - The Account Manager must gain a detailed understanding of the Enterprise workflow management system for Key Account projects and ensure all projects under their management are kept up to date on the system, no cases are left 'unattended' without clear reasoning and case notes to support and dashboards are kept clear.
 - As the Account Manager grows their portfolio of customers, it will be the responsibility of the Account Manager to present their business case for additional resources to support them, in which they will have to account for both the revenue under their management and the operating costs associated with managing their projects.

Visualisation of core skills and responsibilities

Project delivery	Resource management (our OT team)	Customer management	Project planning and management
Organisation & efficiency	Scope control (Customer & delivery team)	Gravitas & authority (From knowledge, capability & leading by example)	Problem solving
Pro-active & reactive management	Commercial awareness	Technical ability (Systems & processes)	Presentation & teaching skills
Contractual terms (Contract interpretation)	Distilling and communicating complex information	Reporting & managing KPIs	Team management & high performance
Intuitive project management	Identifying & mitigating risks	Autonomous decision making	Attention to detail

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Experience, skills and qualifications

The following skills and qualifications will be required/desirable:

- Previous account/project management experience or similar client facing role is essential.
- Ability to successfully manage multiple projects and liaise with multiple senior stakeholders.
- Project and/or programme management experience and evidence of excellent organisational skills, attention to detail and quality.
- Experience of reporting against KPIs and presenting to senior management and clients.
- High level of competency with technology.
- Excellent presentation skills with the confidence and resilience to manage senior client relationships.
- Experience in contractual and project documentation such as Schedules, Briefing Notes, Statements of Work, process workflows etc.
- Experience within (or knowledge of) the healthcare industry is desirable but not essential.
- Managerial and/or leadership experience is essential.
- Willing to undertake a DBS check.

Personal skills & attributes

Fundamental to this role is the character and temperament of the individual. They will be expected to take full responsibility for multiple clients and projects alongside working closely with the Account Executives and Projects Delivery Manager in the client management aspects of their projects. This will take a high level of experience and skill in project management and client management. Important personal skills and attributes include:

Client and project management

- Exceptional client management skills and experience of dealing with multiple stakeholders at a senior level, managing expectations and dealing with challenging situations.
- Formal project management qualifications desirable, or alternatively having worked to a formally recognised project management methodology.
- Strong organisational skills and experience of managing several projects concurrently.
- A skilled communicator, professional, confident and always willing to listen.
- Ability to understand clients' needs, building trust and establishing a strong rapport.
- Excellent stakeholder management skills; interpersonal, relationship-building, persuasive, influencing and negotiating skills.
- Ability to problem solve in a logical and considered manner.
- Results driven with clear understanding of the commercial and financial aspects of successful project delivery.

Team management

- Proven track record of successful team and people management.
- Experience of managing colleagues who have their own portfolio of projects to deliver and providing direction and support (desirable, or equivalent experience).
- Energise, influence, motivate and inspire your team and other colleagues.
- A team player who takes pride in the achievement of a common goal.
- Ability to work with a diverse range of individuals and adapt approach and communication.

Other

- Ability to work with autonomy and act on own initiative.
- An approach which demonstrates strong ownership and responsibility.

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- Confidence to take decisive action based on a sound understanding of the broader context of operational effectiveness.
- Ability to act on own initiative, self-motivated and tenacious.
- Able to remain calm, composed and professional in stressful or confrontational situations and demonstrate a high level of resilience in difficult situations.
- Well presented and highly professional with considerable gravitas to command senior client engagement.
- A strong sense of ethics and integrity with a high degree of personal pride in their work.
- Share in a willingness and desire for TOTP to grow and become more successful.

Working with The OT Practice

We pride ourselves on being a caring, friendly and professional company. We believe the growth of our business to date is directly attributed to ensuring our values are at the core of everything we do. New joiners will receive an initial induction period and undergo a 6-month probation period.

Working hours: Hours Monday to Friday 9am to 5.30pm (5pm Fridays).

Location: RG27 9HY, Hook Hampshire (free on-site parking and close to Hook railway station).

Hybrid Working Scheme (if full time, eligible role, and upon successfully passing probation) 64 days per year to book as home-working days on a Tues, Weds or Thurs.

Holidays: 31 days per year (including Bank Holidays) with option to "purchase" up to 3 additional days each year.

Access to Health Cash Plan: providing video GP appointments, cover for routine prescription / other medical costs as well as access to telephone counselling and online physio assessments.

Account Manager Bonus Scheme: Discretionary bonus scheme aimed to rewarded Account Managers based on portfolio size under their management, where they are exceeding the base level portfolio size expectations of their role.

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