

## The Metiss Group – Senior Account Executive Accountabilities

Accountability	Priority	Percent Time	Success Factors
<b>Prospecting</b> <ul style="list-style-type: none"> <li>• Develop a plan aligned to V/TO</li> <li>• Keep personal contacts warm, reach out to current rolodex, LinkedIn activities</li> <li>• Contact TMG clients</li> <li>• Develop and follow up on leads from Vistage, web</li> <li>• Research and qualify leads based on TMG fit</li> <li>• Conduct marketing presentations</li> <li>• Work sales funnel</li> <li>• Attend networking events</li> </ul>	1	55%	<ul style="list-style-type: none"> <li>• Minimal number of leads were rejected due to TMG fit</li> <li>• ROI for network sourcing was demonstrated</li> <li>• ROI for prospecting investment was demonstrated (time and money)</li> <li>• Qualified lead follow-up was initiated within one business day</li> </ul>
<b>Client Development</b> <ul style="list-style-type: none"> <li>• Nurture long-term/strategic relationships</li> <li>• Upsell</li> <li>• Be voice of the customer (VOC)</li> <li>• Manage client expectations</li> <li>• Handle escalated collection issues</li> <li>• Facilitate hand off to content experts</li> <li>• Deliver high-profile sessions</li> <li>• Conduct gap analysis for additional services</li> <li>• Develop client service plan toward Total Source</li> </ul>	2	15%	<ul style="list-style-type: none"> <li>• Demonstrated minimal “one and done” customer activity</li> <li>• Age of A/R was less than 30 days</li> <li>• Plan was in place for each client</li> <li>• Positive feedback from content experts was experienced</li> <li>• No avoidable surprises were experienced</li> <li>• \$110K in annual existing client sales revenue was achieved</li> </ul>
<b>Client Acquisition</b> <ul style="list-style-type: none"> <li>• Own and execute recommendations process (i.e. present, revise and follow up)</li> <li>• Use complimentary assessments as a sales tool (decision maker’s debrief)</li> <li>• Uncover client “pains” and “define illness”; understand triggering events</li> <li>• Determine initial client service offering / build solutions</li> <li>• Close sale</li> </ul>	3	20%	<ul style="list-style-type: none"> <li>• \$220K in annual new client sales was achieved</li> <li>• Recommendations were turned around within a reasonable timeframe                             <ul style="list-style-type: none"> <li>• Created within one business day</li> <li>• Delivered within one week</li> </ul> </li> <li>• Professional, accurate and complete business recommendations were developed</li> </ul>
<b>Team TMG</b> <ul style="list-style-type: none"> <li>• Update CRM</li> <li>• Manage expense report, travel and calendar</li> <li>• Leverage meeting technology</li> <li>• Attend TMG meetings-one on one, team, sales</li> <li>• Live TMG Core Values</li> <li>• Demonstrate personal and professional development</li> <li>• Participate fully in learning TMG client offerings</li> <li>• Develop and maintain workplace behavior knowledge for added service offerings</li> </ul>	4	10%	<ul style="list-style-type: none"> <li>• CRM was updated daily (Q4)</li> <li>• Effective use of technology was demonstrated</li> <li>• Meetings were attended on time, prepared and engaged</li> <li>• Knowledge of TMG sales offerings was demonstrated</li> <li>• Personal and professional development was demonstrated</li> <li>• TMG core values were adopted and demonstrated</li> <li>• Knowledge of workplace behavior industry developments was demonstrated</li> </ul>