

**Job Title: Account Manager****Revised: October, 2014****Reports to: Corporate Sales Manager/Regional Sales Manager**

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**COMPANY CONFORMANCE STATEMENTS:**

In the performance of their respective tasks and duties all employees are expected to conform to the following:

- Perform quality work within deadlines with or without direct supervision.
- Interact professionally with other employees, customers and vendors.
- Work effectively as a team contributor on all assignments.
- Work independently while understanding the necessity for communicating and coordinating work efforts with other employees and organizations.

**OBJECTIVE:**

Under general supervision, generates new business and provides ongoing service to existing clients and sells the Company's products and services in order to maximize profitable market share in an assigned territory.

**ESSENTIAL FUNCTIONS:**

- 1) Provides customer service to existing clients and generates new business of assigned territory through contact with Realtors, lenders, builders, attorneys, buyers/sellers and other parties. The position may specialize in one or more areas, such as residential, REOs, relocations, commercial, industrial and/or new developments. Assists customers with selection of service options.
- 2) Visits existing and potential customers to establish rapport, maintain visibility, solicit feedback and suggestions, and address complaints on a daily, weekly and monthly basis, or as directed by Corporate Sales Manager. Maintains an **average of 8 visits daily**, unless appropriate level of management directs otherwise.
- 3) Attends mandatory monthly sales meetings, arriving on time.
- 4) Maintains a **minimum average of 15 closed orders monthly**, or as determined by Corporate Sales Manager.
- 5) Coordinates customer service and monitors order processing.
- 6) Assists processors, escrow officers and Realtors with questions and problems relating to the title commitment and closing procedure.
- 7) Attends trade shows, conventions, seminars and related functions to represent the Company and to promote a positive image for the Company.
- 8) Assists in the development, preparation and purchase of promotional and advertising materials.
- 9) Complies with, meets or exceeds paid order and revenue goals based on the Annual Sales Plan at the direction of the Corporate Sales Manager.
- 10) Submits complete and correct title orders in a neat and legible fashion as soon as possible, but within four (4) hours of receipt, and follows them through to ensure a smooth closing and repeat business.
- 11) Ensures quality and timeliness of customer service by maintaining effective communications with internal customers (co-workers).
- 12) Assists internal and external customers with particular needs (i.e., expediting special orders, resolving discrepancies, investigation of and settlement of complaints).
- 13) Maintains accurate records of sales calls, expenses incurred and order volume. Provides regular journal of market activities as directed by Corporate Sales Manager, i.e., agents switching real estate offices, rumors, company closings, competitor updates, or other information requested.
- 14) Continually assesses customer and competitor activities within assigned territory that may affect sales volume or market share. Maintains awareness of competitor practices and advises management of said actions and suggests or recommends strategy to properly counteract actions of competitors.
- 15) Develops and improves sales presentations, continually improves and develops product and service knowledge, sales skills, concepts and techniques, etc.
- 16) Regularly promotes and maintains favorable customer relations for the Company by (a) arranging and participating in the presentation of educational training programs for internal and external customers, their

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associations or other interested groups; (b) entertaining customers at appropriate social events; (c) providing tours of title plant, periodically speaking before professional, business or civic groups on a variety of title, escrow and related topics; (d) attending meetings and serving on committees of local trade associations, and civic and professional groups; (e) preparing and/or providing instructional and training materials on company website online ordering and transaction management to internal and external customers. Attends events after hours as needed.

- 17) Assists in development of territory potential. Assists in determining business climate of assigned territory by analyzing the number of title/escrow orders produced.
- 18) Assists with month-end cash and refinance closings, when needed, at the direction of the Corporate Sales Manager.
- 19) Performs other related duties as assigned.

**KNOWLEDGE, SKILLS & ABILITIES:**

Good working knowledge of computers. Good understanding of residential real estate transactions, title and loan closing procedures. Strong communication skills and an optimistic, enthusiastic and professional attitude are required to coordinate related activities, motivate and convince internal and external customers to successfully achieve end results. Knowledge of specific office procedures, company terminology, organizational structure and area of responsibilities and assignments. Must be able to determine and utilize the level of knowledge and job duties of company personnel, in order to maintain good service level and/or comply with special requests of internal or external customers. Impact of work is directly relevant to revenue dollars of the Company and subject to normal instructions and frequent supervisory review of goals, progress and end-results. Capitalizes on an outgoing personality and service orientation to capture market share in a competitive business. Persistence, optimism and the ability to develop rapport with customers are critical for continually asking for title orders despite rejections. Must be a self-starter with excellent time management and organizational skills to shift schedules and offer prompt, reliable service. Other essential requirements include the ability to negotiate, independence, creativity and a sense of professionalism.

**EDUCATION, EXPERIENCE & LICENSING:**

High school diploma, with experience in title, lending or real estate preferred, or appropriate combination of education and experience. Valid motor vehicle license, reliable transportation and current auto insurance. State notary certificate and an active limited license for title insurance by the State.

This job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee.

Agreed to by: \_\_\_\_\_  
 Account Manager Signature \_\_\_\_\_  
 Date

Printed Name: \_\_\_\_\_

Supervisor: \_\_\_\_\_  
 Corporate/Regional Sales Manager Signature \_\_\_\_\_  
 Date

Printed Name: \_\_\_\_\_