



## JOB DESCRIPTION

**Job Title: Account Manager**

**Reports to: Branch Manager**

**Department: Tree Care/PHC**

**Date: 8/01/2019**

**Status: Exempt**

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### **POSITION SUMMARY:**

The primary role of the Account Manager (hereinafter "AM") is to interface with all potential Clients, Agencies or Organizations, informing and educating them on the Quality and types of Services offered by Stay Green Inc. (hereinafter "the Company"). Represent the Company in a professional and knowledgeable manner which establishes unprecedented recognition.

AM needs to direct the activities of assigned crews to ensure safety, exceed customer service, and ensure that quality standards are achieved while adhering to the operating budget.

Also, the AM must agree to sales goals in accordance with Company growth and potential; as well as, meet or exceed sales volume goals for recurring and non-recurring revenue.

### **EXPERIENCE & TRAINING:**

The AM must have at least three to five years experience in field sales or related experience, or equivalent combination of education and experience; and a good driving record, as determined by our insurance company. Must have intermediate computer skills including, but not limited to, MS Word, Excel, and Outlook.

AM also needs to have technical knowledge of Arboriculture/Plant Health Care practices, International Society of Arboriculture (ISA) Certification, and Qualified Applicator License (QAL).

Other skill set requirements include: the ability to organize, prioritize and allocate workload for optimum efficiency, proficient written and verbal communication, aesthetic and safety of ornamental pruning of trees and plants, plant health knowledge, ability to train and evaluate employees, excellent organizational skills and detail orientation.

### **ESSENTIAL JOB FUNCTIONS:**

The duties listed below are examples of the work typically performed by an employee in this position

**A. Performs job functions timely and efficiently.**



- Uphold and promote all standards of safety as described in the Company's policies, OSHA Regulations, American National Standards Institute (ANSI) Z133, A300 Tree Trimming and Safety Standards and Agriculture Department Laws.
- Immediate reporting of any employee injuries or liability incidents to the Human Resources. AM is also responsible for investigating, documenting, and turning in all paperwork to Human Resources.
- Strategize for Canvassing, Cold Calling, and Prospecting by district and zone that is most effective to the nature of the business.
- Meet weekly with Operation Manager to review all bidding, sales, challenges, progress, etc.
- Meet or exceed sales goals, as well as annual Performance Review development goals.
- Requests from other departments are responded to in a timely, friendly and positive manner.
- Complaints are researched and responded to within 24 hours unless possible to complete same day.
- Complete the Cycle of a Bid/Proposal (see below)
- Perform other duties and special projects as required.

## **B. Cycle of Bid Proposal**

### **Bid/Proposal in Aspire CRM Module**

1. Enter all new leads in CRM and follow the steps required:
  - New
  - Complete
  - Qualified
  - Converted
  - Disqualified
  - Bidding
  - Approved
  - Printed
  - Signed
  - Available
2. Detailed descriptions need to be filled out at all times to minimize confusion and mistakes.
3. Removals need to be described with detail (recommend photo documentation).



### **C. Transition and Scheduling for Crew Leaders**

1. AM will print job sheet and fill out a label for purposes of scheduling on Crew Leader White Boards.
2. Job Sheets to be left in Crew Leaders inbox at the yard with all special needs highlighted on paperwork.
3. All work needs to be scheduled on Aspire Multi Day Scheduler for the following two weeks (no exceptions).
4. Crew Leader white boards need to be updated weekly for exposure to anybody that walks into the yard.
5. AM will communicate daily with their assigned Crew Leader to minimize mistakes and get updates.
6. AM will monitor the hours allocated and not manipulate the data entered into Aspire.

### **D. Closing the Circle**

1. Once the work is complete, AM will make the client aware of completion.
2. AM will be held accountable for entering all hours worked on their Work Orders daily in Aspire System.
3. AM will be held accountable for all completed paperwork to be handed to accounting for invoicing.
4. In the event that client is holding payment, AM will assist in collection of payment (will affect commissions if not paid).

### **E. Demonstrates behaviors, which are consistent with the Code of Conduct and aligned with the organization's mission, vision and shared values.**

- Reports promptly any suspected or potential violations to laws, regulations, procedures, policies and practices, and cooperates in investigations.
- Conducts all transactions in compliance with all company policies, procedures, standards and practices.
- Implement and exceed current Company policy, systems and procedures of all Field Operations, Safety, Quality Control and Technical Training Programs.
- Excellent attendance record; follows sick and rain day procedures.
- Wears appropriate uniform and PPE's for job functions and ensures personal hygiene, keep vehicle, yards and other work areas in good order.



- Represents the Company in a positive and professional manner at all times, maintaining a good rapport and a cooperative working relationship with customers and staff; treats customers and co-workers alike in a courteous and professional manner.
- Maintains organizational and employee confidentiality at all times.

**PHYSICAL REQUIREMENTS:**

The physical requirements described herein are representative of those that must be met by an employee to successfully perform the essential functions of this position.

**Hearing:** Adequate to perform the essential functions of the job.

**Speaking:** Adequate to perform the essential functions of the job, such as clearly communicating with multiple personnel.

**Vision:** Normal visual acuity.

**Other:** Must be able to prioritize, have cognitive reasoning and problem-solving ability.

<p><b>Lifting up to:</b></p> <input type="checkbox"/> 5 lbs. <input checked="" type="checkbox"/> 20 lbs. <input type="checkbox"/> 40 lbs. <input type="checkbox"/> 50 lbs. <input type="checkbox"/> 60 lbs. <input type="checkbox"/> Over 60 lbs. <p><b>Pushing up to:</b></p> <input checked="" type="checkbox"/> 25 lbs. <input type="checkbox"/> 50 lbs. <input type="checkbox"/> 150 lbs. <input type="checkbox"/> 250 lbs. <input type="checkbox"/> Over 250 lbs. <p><b>Manual Dexterity:</b></p> <input type="checkbox"/> Low <input checked="" type="checkbox"/> Medium <input type="checkbox"/> High	<p align="center"><b>Average % of time during regular shift devoted to:</b></p> <table border="0"> <tr> <td><b>Standing</b></td> <td><b>Walking</b></td> <td><b>Squatting</b></td> <td><b>Sitting</b></td> </tr> <tr> <td><input checked="" type="checkbox"/> 0-20 <input type="checkbox"/> 21-40 <input type="checkbox"/> 41-60 <input type="checkbox"/> 61-80 <input type="checkbox"/> 81-100</td> <td><input type="checkbox"/> 0-20 <input type="checkbox"/> 21-40 <input checked="" type="checkbox"/> 41-60 <input type="checkbox"/> 61-80 <input type="checkbox"/> 81-100</td> <td><input checked="" type="checkbox"/> 0-20 <input type="checkbox"/> 21-40 <input type="checkbox"/> 41-60 <input type="checkbox"/> 61-80 <input type="checkbox"/> 81-100</td> <td><input type="checkbox"/> 0-20 <input checked="" type="checkbox"/> 21-40 <input type="checkbox"/> 41-60 <input type="checkbox"/> 61-80 <input type="checkbox"/> 81-100</td> </tr> </table>				<b>Standing</b>	<b>Walking</b>	<b>Squatting</b>	<b>Sitting</b>	<input checked="" type="checkbox"/> 0-20 <input type="checkbox"/> 21-40 <input type="checkbox"/> 41-60 <input type="checkbox"/> 61-80 <input type="checkbox"/> 81-100	<input type="checkbox"/> 0-20 <input type="checkbox"/> 21-40 <input checked="" type="checkbox"/> 41-60 <input type="checkbox"/> 61-80 <input type="checkbox"/> 81-100	<input checked="" type="checkbox"/> 0-20 <input type="checkbox"/> 21-40 <input type="checkbox"/> 41-60 <input type="checkbox"/> 61-80 <input type="checkbox"/> 81-100	<input type="checkbox"/> 0-20 <input checked="" type="checkbox"/> 21-40 <input type="checkbox"/> 41-60 <input type="checkbox"/> 61-80 <input type="checkbox"/> 81-100																																																																						
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In compliance with applicable disability laws, reasonable accommodations may be provided for qualified individuals with a disability who require and request such accommodations. Incumbents and applicants who have been offered employment by Stay Green, Inc. are encouraged to discuss potential accommodations with the employer.

Management has the right to add or change these duties of the position at any time.

**APPROVAL AND ACKNOWLEDGMENT OF RECEIPT**

\*Employee: \_\_\_\_\_ Date: \_\_\_\_\_  
(Signature)

Employee: \_\_\_\_\_ Date: \_\_\_\_\_  
(Print)

Manager: \_\_\_\_\_ Date: \_\_\_\_\_  
(Signature)

Manager: \_\_\_\_\_ Date: \_\_\_\_\_  
(Print)

*\*Employee signature acknowledges understanding of the essential functions and requirements of this position. Employee also acknowledges receipt of this position description.*