

## JOB DESCRIPTION

**Job Title:** Relationship Manager  
**Department:** Customer Success  
**Reports To:** Customer Success & Operations Manager  
**FLSA Status:** Exempt

**Position Summary:** The primary role of a Relationship Manager is to ensure quality of service and performance targets are met. The position is instrumental in nurturing relationships to be strong revenue sources for the company, by developing a deep understanding of client relationship and business needs. Lead improvements to ensure client retention and revenue growth in quarterly/annual quota are attained and business strategies and objectives are achieved.

Must be comfortable working in a fast-paced environment and has the ability to resolve complex inquiries. Possesses deep knowledge and understanding of industry concepts, practices, procedures, and guidelines. Performs a variety of tasks and reports to a leader. Must be sensitive to confidential matters.

**Essential Duties and Responsibilities:** To perform this job successfully, an individual must be able to perform the following satisfactorily; other duties may be assigned. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Prepare and accurately forecast quarterly and annual sales targets. Prepare QBRs via phone or in-person with top tier ISOs (includes building report cards); Setting and preparing monthly (and bi-weekly) sales report and targets showing Top Agents and MID count production.
- Manage continued relationship development by designing and successfully executing business plans and go-to-market strategies intended to grow our merchant processing portfolio through partner relationships; Land and expand: increase revenue-per-ISO rate by developing excellent working relationships with new and existing partners; Protect confidential and proprietary interests between company and clients.
- Coordinate with Sales, Marketing, and Product to identify service needs, solution implementations, service delivery and drive use of proactive service and support mechanisms to reduce client downtime and support costs.
- Facilitate partner training on PayScout products and services as they are rolled out.
- Develop and implement methods and strategies for cross-selling to meet the needs of clients by means of identifying possible opportunities within a specific business model; Perform solution engineering initiatives to provide products and services consult and improve client's business workflow.
- Design and successfully execute strategies that maintain the key focus of merchant retention, including effective strategic action and resolution of any issues leading to overall merchant satisfaction.
- Perform a variety of task and support as needed.



**Competencies:** To perform the job successfully, an individual should demonstrate the following.

- **Analytical** - Synthesizes complex or diverse information; collects and researches data; uses intuition and experience to complement data; designs work flows and procedures.
- **Problem Solving** - Identifies and resolves problems in a timely manner; gathers and analyzes information skillfully; develops alternative solutions; works well in group problem solving situations; uses reason even when dealing with emotional topics.
- **Teamwork** - Balances team and individual responsibilities; exhibits objectivity and openness to others' views; gives and welcomes feedback; contributes to building a positive team spirit; puts success of team above own interests; able to build morale and group commitments to goals and objectives; supports everyone's efforts to succeed.
- **Business Acumen** - Understands business implications of decisions; displays orientation to profitability; demonstrates knowledge of market and competition; aligns work with strategic goals.
- **Ethics** - Treats people with respect; keeps commitments; inspires the trust of others; works with integrity and principles; upholds organizational values.
- **Professionalism**- Approaches others in a tactful manner; reacts well under pressure; treats others with respect and consideration regardless of their status or position; accepts responsibility for own actions; follows through on commitments.

**Qualifications:** To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

**Education/Experience:**

- Bachelor's degree (B. A.) from four-year college or university; or one to two years related experience and/or training; or equivalent combination of education and experience.

**Language Ability:**

- Ability to read, analyze, and interpret general business periodicals, professional journals, technical procedures, or governmental regulations.
- Ability to write reports, business correspondence, and procedure manuals.
- Ability to effectively present information and respond to questions from groups of managers, clients, customers, and the general public.

**Math Ability:**

- Ability to calculate figures and amounts such as discounts, interest, commissions, proportions, percentages, area, circumference, and volume.
- Ability to apply concepts of basic algebra and geometry.

**Reasoning Ability:**

- Ability to solve practical problems and deal with a variety of concrete variables in situations where only limited standardization exists.
- Ability to interpret a variety of instructions furnished in written, oral, diagram, or schedule form.

**Computer Skills:** Word Processing, Spreadsheets, Inventory, developmental software, Internet



