Account Leader Experience

Mature

"Quality needs more atten-"Good methodology and "AL role seems overwhelmtion...not all markets do QPD "Sometimes financial targets funnel planning would be ing at first but then you process" from director aren't clear awesome" realize you don't really "Entering activities and (not sure where it came have to do it all" opportunities takes a lot of 'We don't have a place to from)" time, lots of waiting for store information about things to load and clicking client's business" "I don't think planning is back and forth" "Old Point B self serve happening consistently across accounts" model isn't going to work as firm gets younger" "A clarification for what AL "Things can go sideways is NOT responsible for with multiple AL's on an would be great" account" "Associate support is import-"Knowing who to reach out "I can't spend 30 minutes a ant part of AL role but it is to for help is just based on day messing around with often overlooked and out "There are too many ways to tenure, knowing who to talk Changepoint" prioritized." do things" "Administrative tasks are my "AL structure at account lowest priority" isn't very effective" Customer "We need training on tools "Feels like we lose a ton of for AL's. We have no stan-Experience history because we have no "I'm not sure you could make dardized training" easy way to track it" Changepoint worse" **Prioritization Ownership** Methodology Information **System** AL's have many responsi-Many AL's have little actual Many activities and opporbilities, the most important control over what happens tunities do not get entered of which keep the account at their account, who gets Changepoint is cumberin Changepoint. Project running (think invoicing). staffed, what roles they will some to use. It takes too There is no common Client and associate experisummaries are inconsistently Outside of these critical sell, or the margin goals understanding of processes long to get information into ence varies from account to or reinforcement of best completed. Account history items, AL's are faced with a they are able to meet. AL's and out of the system. AL's is often only in the AL's slew of things they "should account, and even within often share responsibility for don't find the tool intuitive, practices. Each AL has head or another associates be" doing, but in all reality accounts depending on an account and so ultimate much leeway in how they and they don't trust the data who the AL is. inaccessible files. don't have the time to do. ownership is unclear. manage their account. it contains.

point **b**.