



## Job Description Member Relationship Manager

---

<b>Position Title:</b>	Member Relationship Manager
<b>Last Modification Date:</b>	May 24, 2022
<b>Budget Category:</b>	Organizational Sustainability (50%) - Business Resources (50%)
<b>Accountable to:</b>	Controller/HR Coordinator <span style="float: right;">FLSA Status: <b>Exempt</b></span>

---

**RESULTS STATEMENT: *I am accountable for producing the following results:***

One Southern Indiana (1si) expects this position to be accountable for overseeing all revenue activities related to bringing in new members, upgrading existing members, retention of existing members and maintaining a high level of member engagement. The Member Relationship Manager is also the staff liaison for various 1si groups and committees.

This position will also work closely with the Director of Business Retention & Expansion and Talent in the goal of growing MMA membership and engagement and the Manager of Diversity, Equity & Inclusion in the goal of growing a more diverse membership and their engagement.

In addition, as a member of the business resource team, this Member Relationship Manager position assists in establishing the membership development strategy and metrics of success, implementing actions toward that strategy, and measuring results toward strategic goals. This position requires a mix of team-oriented activities as well as independent judgment and discretion. The need to focus on details and follow-through cannot be overstated for this position.

---

**ESSENTIAL JOB FUNCTIONS**

1. Meet or exceed budgeted new membership revenue annual goal (this includes new members, membership upgrades and potential membership campaign(s) as budgeted each fiscal year).
2. Maximize sales opportunities and proactively work to minimize “one-and-done” memberships (members who join for one year and do not renew their membership).
3. Ensure the “pipeline” of prospective new members/clients is properly recorded and constantly being updated. Appointments are to be set from this pipeline and all follow-up noted. Create and maintain prospect profiles within CRM data management platform (currently Atlas).
4. Attend most member events as well as other events where prospective new members may be found. This includes both 1si events as well as events outside 1si.
5. Schedule and execute outside sales calls through one on one meetings, attending non 1si events and following up on all referrals from 1si members and staff.
6. Keep detailed record of prospecting and weekly member activities (goals, calls made, appointments scheduled & conducted, new or upgraded memberships completed, declines, potential drops, etc.) through Outlook Calendar and 1si’s CRM data management platform (currently Atlas). Report each week’s activity to Controller/HR Coordinator the following Monday by noon.
7. Manage communications with members on accounts receivable matters as they pertain to membership. This may include seeking status on accounts receivable payments.
8. Meet with prospects based upon their availability. Must be flexible and available as appointments may need to be early morning or evening hours.



## Job Description Member Relationship Manager

---

9. Foster current membership relationships and maximizing member benefits for retention. Identify key staff in member companies to cultivate profitable and lasting relationships.
10. Actively promote 1si member services such as sponsorship, Affinity programs, advertising opportunities, and investment opportunities.
11. Assist Regional Advantage members with personalized one-on-one service.
12. Manage Membership and Leads Groups events including, but not limited to, luncheons, breakfast roundtables, and new member orientations. This includes scheduling, event set up within Atlas, registration, meeting content, set up, clean up, etc.
13. 1si Host duties at networking events, ribbon cuttings, ground breakings, grand openings, and 1si signature events.
14. Prepare monthly report (due the Wednesday after month-ending) for executive team that reflects:
  - a. New Membership Revenue (actual revenue as compared goal)
  - b. Pipeline Update
  - c. Retention %
  - d. Dropped Members (# and reasons)
  - e. Goals for the month along with Quarterly updates
  - f. Membership Successes / Concerns
    - i. Goals for maximizing / addressing
  - g. Support, resources, and / or tools needed to drive membership sales and engagement
15. Perform administrative services as needed to support members and the organization.
16. Other duties as assigned.

---

### **ESSENTIAL SKILLS AND EXPERIENCE**

1. Undergraduate degree preferred; or High School Diploma (or GED/High School Equivalence Certificate) with minimum three (3) years of commensurate sales experience in new business acquisition and customer development is a must.
2. Very organized in use of tools including Outlook, CRM and others as provided.
3. A self-starter, assertive demeanor and lifelong learner.
4. Ability to manage, motivate and influence diverse groups of people.
5. Comfortable in a variety of work environments, including public speaking and presenting. Ability to hold the attention of large groups of people.
6. Understand basic business financial statements and reports.
7. Develop innovative approaches and ideas; Presents ideas and information in a manner that persuades positive interaction.
8. This role requires exceptional listening skills, perception, and ability to overcome objections; all while fostering positive relationships.
9. Appropriate and proficient phone and social media skills.
10. Prioritize daily functions with multiple deadlines and high volumes of work.
11. MS Office Proficient; Use keyboard, laptop, projection equipment, and other office equipment with proficiency.

---

### **ESSENTIAL PHYSICAL REQUIREMENTS AND WORK ENVIRONMENT**

1. Ability to maintain physical condition appropriate to the performance of assigned duties and
-



## Job Description Member Relationship Manager

responsibilities which may include: sitting, standing, or walking for extended periods of time; operating office equipment; arrange meeting room tables and chairs; and lifting up to 25 pounds.

2. Visual Acuity; ability to see and hear within normal parameters, must use hands and fingers to use keyboard and mouse; operate equipment or controls; reach above shoulder heights; below the waist; or lift to file documents or store materials throughout the day. Proper lifting techniques required.
3. Ability to self-transport from office to member/client meetings.
4. Dress for this position is business casual or business attire (unless the day's tasks require otherwise) always having closed toe footwear available for any scheduled or impromptu on-site meetings. A clean, professional, well-groomed appearance is expected.

*Nothing in this job description restricts management's right to assign or reassign duties and responsibilities to this job at any time.*

### **SIGNATURES:**

**Statement of the Position Holder:** I accept the accountabilities of this position and agree to produce the results, perform the work, and meet the standards set forth in this job description.

Employee Acceptance:

_____	____/____/____
Signature	Date
_____	
Printed Name	

**Statement of the Position Holder's Manager:** I agree to provide a working environment, necessary resources, and appropriate training to enable the accountabilities of this position (results, work, and standards) to be accomplished.

_____	____/____/____
Supervisor Signature	Date
_____	
Printed Name	