

# How to Hire, Onboard & Train An Account Manager

By: **Azhar Siddiqui**  
& **Jeff Fisher**



RepStack



# HOW TO HIRE THE FIRST VIRTUAL ACCOUNT MANAGER FOR YOUR DIGITAL MARKETING AGENCY

## Do You Even Need An Account Manager?

Here are the top five reasons to hire an Account Manager.

- 1) **Frees up time by letting you step back from the day-to-day activities:** Account Managers can perform your core activities, you have more time to focus on growing your business. Rather than wasting time and resources in doing day-to-day operations, you can invest in thinking strategically and activating massive growth.
- 2) **Reduced costs:** Most business owners and entrepreneurs hire Account Managers to reduce their overhead costs. This means lower salaries and operating costs.
- 3) **Quickly scale your business operations:** Account Managers can also help you scale up your business operations quickly.
- 4) **Strengthen weak areas:** Entrepreneurs like to be in control and doing things themselves. Let's face it: It's not possible to be the jack of all trades! With Account managers, you can make up for the skill gap in your organization. It'll provide you with a pipeline of extra skill sets.
- 5) **Offer World Class Customer Service:** Most Account Managers can work in international time zones.

**Feel free to check out our 2021 Virtual Assistant Checklist which will identify your need to hire. [View Now](#)**



### Do You Need To Hire A Virtual Assistant?

Goal: Identifying the need to hire an elite entry-level manager to fill one of these positions: Sales Rep, Marketing Assistant, Account Manager.

- ☐ Are you making at least \$10,000 in monthly agency revenue?
- ☐ Do you have at least two full time employees (including yourself)?
- ☐ Do you want to hire a full-time employee without thinking of long-term contracts, W-2 etc.
- ☐ Are you interested in hiring a paid advertising specialist i.e. social media marketing?
- ☐ Are you looking for an Agency Sales Representative who can close 5 figure deals?
- ☐ Are you handling all Inbound & Outbound sales calls yourself and need to fire up time?
- ☐ Do you want to focus on the strategic aspect of your business, while letting your VA manage all client-facing activities?

\*you need to hire a Virtual Assistant if more than 3 were ✓  
Learn more at [repstack.co](#)

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# Account Managers

## Position Overview

Excellent communicators with a commitment to client satisfaction often thrive in an account management career. An account manager's attentiveness to the needs of those they represent can be the difference between a happy customer who maintains a long-term relationship with the company and an unhappy one who takes business elsewhere.

Account manager responsibilities include developing long-term relationships with a portfolio of clients, connecting with key business executives and stakeholders. Account Managers liaise between customers and cross-functional internal teams to ensure the timely and successful delivery of your solutions according to customer needs. Manage and develop client accounts to initiate and maintain favourable relationships with clients. Responsible for leading a team of Account Managers dedicated to meeting the operational needs of assigned clients.

*Example Job Post:* [Example 1](#)

## Account Manager

We are looking for a skilled Key Account Manager to oversee the relationships of the company with its most important clients. You will be responsible for obtaining and maintaining long term key customers by comprehending their requirements.

The ideal candidate will be apt in building strong relationships with strategic customers. You will be able to identify needs and requirements to promote our company's solutions and achieve mutual satisfaction. The goal is to contribute to sustaining and growing our business to achieve long-term success.





## **Responsibilities**

- Develop trust relationships with a portfolio of major clients to ensure they do not turn to competition
- Acquire a thorough understanding of key customer needs and requirements
- Expand the relationships with existing customers by continuously proposing solutions that meet their objectives
- Ensure the correct products and services are delivered to customers in a timely manner
- Serve as the link of communication between key customers and internal teams
- Resolve any issues and problems faced by customers and deal with complaints to maintain trust
- Play an integral part in generating new sales that will turn into long-lasting relationships
- Prepare regular reports of progress and forecasts to internal and external stakeholders using key account metrics.

## **Requirements**

- Proven experience as a key account manager
- Experience in sales and providing solutions based on customer needs
- Strong communication and interpersonal skills with aptitude in building relationships with professionals of all organizational levels
- Excellent organizational skills
- Ability in problem-solving and negotiation
- BSc/BA in business administration, sales or relevant field





## **Targets & Benchmarks You Should Expect:**

- Retaining current agency accounts every month.
- Making upsells.
- Collecting client reviews.
- Holding regular review meetings with clients.
- Acting as a liaison between the client and your agency - conveying information, ensuring a smooth lead-flow process, while managing client accounts.
- Making the client aware of other services and actions that may lead to greater success. Upsells.
- Monitoring the client's budget, explaining costs, and negotiating new terms if necessary.
- Keeping up on trends, changes, and competitor actions that might affect their client, i.e. social media policy changes, advertising rules etc.
- Negotiate contracts and close agreements to maximize profits.
- Providing progress reports to clients and upper management.
- Acting as an initiator and nurturing your lead flow.
- Growing current accounts.



# Account Manager Advantage

## Skills & Requirements

- Proven work experience as an Account Manager.
- Demonstrable ability to communicate, present and influence key stakeholders at all levels of an organization.
- Solid experience with CRM software (GoHighLevel, Zoho CRM or HubSpot) and MS Office (particularly MS Excel).
- Experience delivering client-focused solutions to customer needs.
- Proven ability to juggle multiple account management projects at a time, while maintaining sharp attention to detail.
- Excellent listening, negotiation and presentation abilities.
- Strong verbal and written communication skills.
- BA/BS degree in Business Administration, Sales or relevant field.

## Roles Duties & Expectations

- Meet with clients at least once per month to review reports, progress & plan going forward
- Run monthly reports (Ranking Report, AdWords, Analytics).
- Put together key feedback for a meeting or recap message.
- Do live meetings via Join, Zoom or some other live technology where they can see your screen.
- Send a follow-up email with key items covered.
- If a meeting can't be arranged, then an email recap should be sent each month.
- Develop a quarterly strategy for each client.
- Update chart of accounts along with status.
- Send a recap email in absence of a meeting.
- Respond to client emails on a proactive basis (within the same business day).
- Answer client inbound calls & deal with requests as needed.
- Document tickets & follow-through on open items for clients.
- Follow-up on tickets weekly to ensure they are in progress & close the loop with clients.





## Compensation

You will want to pay your account manager between \$35K – \$55K salary. You could offer compensation on a sliding scale as they get trained up & add value:

- This is a \$45K per year position + bonuses.
- During the training period of 90 days, you will earn \$35K.
- Once you get out of that first 90 days and start to take on your first accounts, you will be increased to \$40K.
- Once you have a full load of accounts and are fully trained (30–35 clients), you will be increased to \$45K.

You could also incentivize the Account Manager based on client retention & up-sells.

- 20% of the first-month billing increase (depending upon service up-sold).
- \$500 quarterly bonus as long as retention is greater than 97%.

## The RepStack Advantage

We provide elite entry-level managers for a fraction of the price! You don't have to pay the premium when hiring from us. Our account managers receive:

- Bi-Weekly Trainings by Jeff Fisher
- Bi-Weekly Trainings by RepStack
- State of the art training program: The RepStack Success Academy
- Udemy, Coursera Courses for VA's.
- Weekly VA Check-ins
- Weekly Client Check-ins
- And More!







Here is just one example of how a RepStack qualified Account Manager manages their client's social media presence. [Fatima – Mark Perna](#)



[Mark Perna](#)

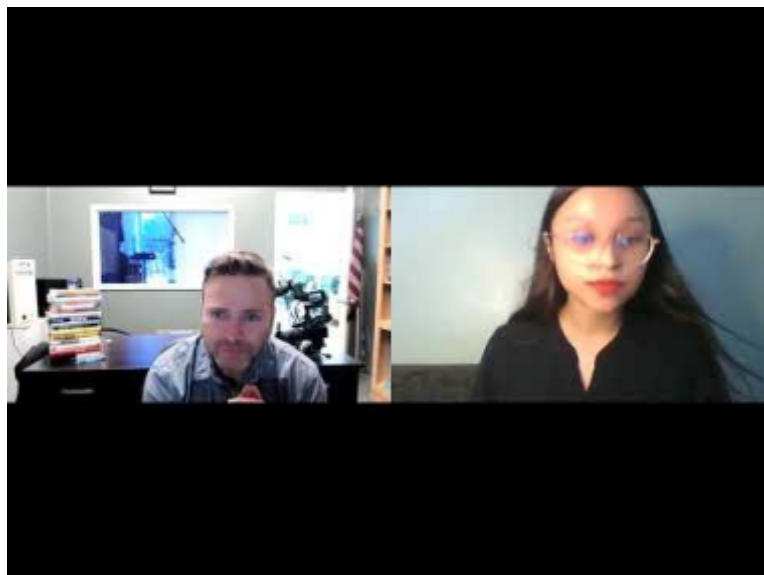
## Case Study: Asmaa Khan – Lyn Askin

Asmaa Khan has been crushing it for her client and 7FA coach Lynn Askin. She has been working with Lyn for over 5 months, continuously providing support and structure to his team.





[Asmaa - Lyn & Ashley](#)



[Lyn Askin](#)

## The VA Hiring Process (Repstack)

- You Book a Discovery call with us.
- We hand-pick an account manager
- During our Pre-boarding process, your shortlisted Account Manager goes through a minimum of 4 interviews with our internal team.





- We provide the Account Manager with any additional training materials (short course, training webinars) as per your requirement.
- Intro-call Booked with your Account Manager.

R1 – Round 1 <b>The Hunt</b>	We build a JD according to the clients needs and start sending in requests.
R2 – Round 2 <b>Second Interview</b>	All qualified leads are sorted to find the perfect VA for the position
R3 – Round 3 <b>Third Interview</b>	Our Sales team joins in on the selected candidates and checks if the clients requirements match the candidates skills.
R4 – Round 4 <b>Dry Run</b>	We look for any red flags that pop up in an intense questions and answers session to check if they (the VA) can work under pressure.
<b>Intro Call with Client</b>	Meeting with you, the client, ask each other questions. We have a 95% approval rate at this stage

## Pre-Screening Process:

- Have them send a video/voicemail intro to ensure they have strong enough spoken English speaking skills & that the accent won't be an issue.
- Have them take a [Kolbe](#) or [DISC](#) Assessment (RepStack offers one free Kolbe Assessment if you choose to work with us).

## The Interview:

- Tell me a little about yourself. Where you are from. What your hobbies are. What's important to you?
- What were you doing most recently? Why did you leave?
- What are your strengths...what do you feel like you do best?
- What type of work have you done with others in the past?





- What does your work environment look like? Do you have a quiet dedicated place to work? Do you have high-speed internet? What about your computer...
- What interested you in this position?
- Are you looking for a short-term or long term role?
- If we contacted your last employer & asked them to rate you on a scale from 1-10 (with 1 being terrible & 10 being the best). What would they rate you & why?
- If you choose to work with RepStack all the above questions are pre-verified during multiple vetting interviews.

## Expectations to communicate

1. **Responsiveness:** Be quick to reply when I send a message and on top of the ball. To me, that is the most important aspect of this role. If I send a message during work hours and don't hear back quickly I will question how engaged you are in the position.
2. **Be resourceful:** I'll share with you what I need to do and how to get around, but if you are stuck on something try to solve it yourself before asking me or another team member. If it's something you could have solved by contacting support or doing a Google search first...then do that.
3. **Honesty:** Just be honest & forthcoming in all our dealings.
4. **Innovate:** We are an extremely fast-growing business. As you go about your job, we want you to find ways to improve things, make suggestions and enhance the way we operate.
5. **Work hard:** There is a lot to do. I'll need you by my side proactively learning, innovating and getting things done.
6. **Ask for help:** If you need direction, resources, support doesn't hesitate to ask...I want you to be happy, clear and fulfilled in your role.

## Pre-Onboarding – RepStack Exclusive Process

Currently only offered by RepStack, if you can get this process introduced using other sources it will add one more step to ensure you are getting the right VA. However, it may turn away some of the talents on Upwork.





### *16 to 20 hours of Pre-OnBoarding training (not billed to you) includes:*

- Complete a customized 90-day learning path for the VA. The VA and RepStack build out the first draft and you approve it. Here is a template for such a plan: [90-Day Training Plan](#)
- VA gets introduced to company culture, our work ethic etc.
- Baseline training and assessment for the CRM of your choice completed by the VA
- Setup of all tools and software before day 1
- VA starts communicating and reports back to you daily so you can gauge communication style
- Stress-test work from home setup;
  - ◆ Internet speed, minimum 15mbps
  - ◆ Power backup in place
  - ◆ Work laptop with the right hardware provided to the VA
  - ◆ Any additional hardware needed to do the job provided
  - ◆ VPN
  - ◆ Home Office Setup verified
  - ◆ Setup of time doctor for the VA
  - ◆ Camera and lighting

## OnBoarding

- What tools need to be set up for them? Who will set those up? Create a checklist.
- What will their orientation process look like?
  - ◆ Initial Day
  - ◆ Accessing Tools / Software
  - ◆ Communication Expectations
- How will they be trained in what you expect them to do?
  - ◆ Orientation on the roll
  - ◆ Training on the day-to-day
- What will they be expected to report daily/weekly / monthly?
- How will you gauge their performance
- Communicate the expectations!





## Ongoing Training, Management & Accountability

*When will they meet with you for feedback?*

*How will you continue to train & develop them?*

Below are RepStack only processes, but you should have something similar present if you hire outside of RepStack:

- Bi-Weekly Trainings by Jeff Fisher – Chief Growth Officer, RepStack
- Bi-Weekly Trainings by RepStack
- Weekly CRM Training with Andrew Cass – Founder of PipelinePro.
- Udemy, Coursera Courses for VA's.
- Weekly VA Check-ins
- Monthly Client Check-ins
- Time Tracking Application: RepStack uses Time Doctor, while Upwork uses its native software.
- Tracking EOD reports
- RepStack Success Academy for all associates





# Hiring Process Comparison

## RepStack Vs. Freelancers

S#	RepStack	Fiverr, Upwork, Onlinejobs.ph, local job boards
#1	<b>Book a Discovery Call</b> You Book a free discovery call with us on our Calendar, where we'll discuss your business model, your requirements etc.	<b>Define A Budget</b> Keep in mind that many freelancers are business owners; they pay their own taxes, insurance, and overhead. So their hourly rates may be slightly higher than an employee's. A USA-based VA usually starts at \$25/ hour. Offshore quality VA will be between \$10 and \$18/ hour.
#2	<b>Leave The Rest To Us</b> We will take care of the rest. No need to worry about hiring the right VA. Rest assured, we will provide you with our best talent	<b>Create a Job Description</b> Be extremely clear on your job description so you can attract the right people. RepStack can provide these JDs upon request
#3	<b>R1 - The Hunt</b> After building a Job Description, we start sending out requests according to the needs of the client	<b>Start Shortlisting</b> After you post your job description, it is time to start shortlisting candidates for your business. This process can be time-consuming.
#4	<b>R2 - Second Interview</b> Here all the unqualified leads are sorted to find the perfect VA for the position.	<b>Find The Best</b> Start interviewing your shortlisted candidates, by setting up a time and date and then scheduling a meeting.
#5	<b>R3- Third Interview</b> Here the sales team join in on the selected candidates and checks if the clients' requirements match the candidates' skills	<b>Assess Their Abilities</b> Conduct an interview. Most freelancers work remotely, so this may be the only time you'll ever "meet" the person. When you conduct a video interview, you can gain a better sense of the person's abilities and fit than just talking to them over the



		phone. We also recommend a Slack-based interview so you can check their written communications.
#6	<b>Dry Run - Fourth Interview</b> The Dry run is a kind of simulation interview where we ask pressure questions and identify any red flags.	<b>Hire The Freelancer</b> When discussing project details, understand that both of you are negotiating an agreement that covers when the person can start, what they'll deliver, when those deliverables are expected, and payment terms. Unlike an employee, you don't manage or tell freelancers how to do their work, they control all that themselves.
#7	<b>Intro Call With Client</b> This is your first meeting with your future Superstar VA. 95% of the time we get a yes for the VA we bring forward to meet you.	<b>Create &amp; Sign A Contract</b> Make your agreement official with a contract. Good contracts are detailed, yet concise so they're very clear. Your contract not only protects the business and the talent, but it also serves as proof to the IRS that you're not violating any worker classification laws.
#8	<b>Pre-Boarding - Repstack Only</b> We onboard the VA, start them on their learning paths you picked and open a communication channel with you. This 20 hours of intense training is free of charge for you and designed to pick out any final red flags before the VA onboards with you.	<b>Rinse &amp; Repeat Process (If It doesn't work out)</b> You'll have to repeat the whole hiring process if you encounter any issues, for example, your freelancer being a no-show, financial issues (bank transfer), scam, etc.

**Key: We'll do it for you**



**Key: You're on your own**







## Performance Benchmarks – RepStack

Below is a sample process that RepStack conducts on your behalf.  
Daily VA reporting, here are some sample day end reports for

- Account Manager: [Day End Reports](#)

## Additional Resources

- [Book a free Discovery Call](#)

