

Volunteer Roles and Responsibilities – Account Executive

Reports to: Division Chair

Commitment: Time commitment is individual to each account with a general timeline of May through June and September through December periods.

Purpose: The Account Executive (AE) is the primary contact for securing existing and lapsed business accounts for the upcoming campaign. In conjunction with the Division Chair, the AE works towards achieving goals set by engaging with targeted accounts and reporting progress to the Division Chair.

Reporting Relationships

- Account Executives report on developments and progress within their respective division or accounts to the Division Chair.
- Supported by Resource Development staff.

Qualities to ensure success

- Committed to United Way's mission
- Leadership & dedication
- Communication and motivational skills
- Planning & analytical skills

Responsibilities

- Attend Account Executive orientation
- Serve as a resource to Division Chairs
- Regularly dialogue with Division Chair
- Assist Division Chair in developing and carrying out an action plan
- Support the United Way with your donation
- Schedule, conduct and follow-up, on business calls (the 'ask')
- Serve as the primary contact to assigned accounts
- Regularly report progress to Division Chair
- Thank your accounts
- Participate in the Division evaluation at the end of campaign
- Attend employee events and award presentations (where appropriate)
- Attend Cabinet meetings (optional)

ACCOUNT EXECUTIVE TIMELINE

Your Role:

Meet with businesses who currently engage in a United Way of Central Alberta campaign ensuring continued support and identify opportunities for future growth as appropriate. Also explore opportunities for lapsed donors (supported United Way in the past but not in the past few years) to re-engage as a United Way of Central Alberta supporter.

ACTION	COMPLETED BY
Participate in Account Executive orientation	April
Assist Division Chair in analyzing accounts	April
Attend scheduled meetings with Division Chair in order to identify opportunities / challenges and to help plan strategies	April - December
Schedule visits to businesses	April - December
Make visit to business owner (based on tailored agenda)	April - December
Follow-up with business manager/contact where appropriate to reinforce discussion	April - December
Participate in Division evaluation at campaign-end	December
Extend thank you to business (card, letter or telephone call)	December
Be available for employee award presentations as required	December - February