



Job Description: Account Manager

Updated 9/14/2021

Mission

The person in the role of Account Manager will be the key contact for all Sophrona ifa EHR clients and be responsible for implementations of new features, light follow-up training, sharing best practices, and general communication with clients. Those who thrive in this role are eager to learn new things, have a “do whatever it takes” attitude, are good communicators who can manage client expectations, are tech savvy problem solvers, and find great personal satisfaction in helping clients.

The person in the role of Sr. Account Manager will have increased responsibilities. They will typically be assigned to work with top tier clients, will provide coaching and occasional direction to Account Managers and will be responsible for the introduction of new software at alpha/beta sites. They may be asked to work closely with Sophrona partners.

Responsibilities

Account Management

- Develop and maintain strong long-lasting client relationships.
- Operate as a main point of contact for an assigned set of clients.
- Conduct client portal and service reviews to help clients maximize the benefits of Sophrona services.
- Identify and communicate sales opportunities to the sales team.
- Ensure the timely and successful delivery of our solutions according to client needs.
- Utilize internal company resources to find answers for clients.
- Act as client advocate in the event of high severity issues.
- Serve as a business consultant; trouble shoot and make useful suggestions for patient workflows to maximize the value of EHR.

Implementation Management

- Enable and maintain successful implementations for new clients with consistent follow-up, communication, and consulting.
- Work with implementation team to define project approach and timeline.
- Identify process champions within client team to facilitate the implementation process
- Coordinate implementations from greenlighting to go-live: schedule and conduct kick-offs, reach out, get info, answer questions, be point person, answer questions about software.
- Provide new clients with consistent post-implementation follow-up.
- Conduct online and onsite application training in a back-up capacity as needed.



- Develop and maintain proficiency using Sophrona project management tools according to best practices.

Software Development Life Cycle

- Remain aware of release cycles and software version changes and release notes.
- Help development team with regression testing as requested from time to time.
- Identify clients best suited for alpha and beta testing.
- Serve as a key liaison between software development team and alpha and beta testing sites, manage communication and coordination with clients who are helping with testing and verifying functionality at alpha and beta sites.
- Partner with clients at alpha and beta sites to complete user acceptance testing (UAT).
- Provide feedback and submit bugs to the development team
- Help development team identify software changes that will impact clients and how these are best to be communicated to clients.
- Serve as voice of the client for select software development initiatives and projects.

Support

- Provide first line of defense as needed for operational questions and issues.
- Acknowledge and triage issues as appropriate.
- Research client issues; escalate to development team as appropriate; manage client expectations and provide them with consistent clear updates; communicate via email and phone with client staff as well as patients to assist development team in isolating root cause; resolve simple issues related to login issues; provide clients with system explanations as appropriate.
- Provide limited support coverage as needed.
- Develop and maintain proficiency using Sophrona support and project management tools.

Sales & Marketing

- Cultivate, identify, help create, and share client success stories.
- Conduct product demonstrations
- Attend conferences from time to time as needed
- Develop and maintain proficiency using Sophrona CRM tools according to best practices
- Contribute to Sales & Marketing team planning and execution of marketing initiatives.

Business Knowledge

- Develop and maintain a solid working understanding in how Sophrona applications and interface engines work.
- Maintain knowledge and expertise by learning new and evolving technologies and by achieving appropriate industry and professional certifications.



- Understand how EHR, practice management system, and patient communication technology fits within the overall practice technology environment and healthcare landscape.
- Develop a good general understanding of ophthalmology practice workflow and patient care responsibilities.
- Develop and maintain a solid general knowledge of all Sophrona applications, their business purposes, and how the patient portal fits within the overall practice technology environment.
- *Maintain a general sense of Sophrona strategic priorities and help advance partner relationships.*

Job Requirements

Required Skills

- Four year college degree
- Prior work experience in a medical clinic setting
- Excellent communication skills and team player.
- Excellent verbal and written communication skills.
- Inquisitive with a desire to learn.
- A solid understanding of internet technology and information management systems.
- Ability to effectively establish open communication and trusting personal rapport with client staff of all levels by phone.
- Confident about pursuing and investigating solutions with minimal initial information.
- Ability to successfully work with organizational leaders to define a project's scope, tasks, responsible parties, and timeline, and to secure organizational commitment to the project's success.
- Self-motivated. Able to self-manage time, prioritize multiple tasks and areas of responsibility, provide estimates of how much time is needed to complete own tasks, set own deadlines, and deliver tasks on time.
- Clearly communicate with management and others when problems arise or when timelines will not be met.
- Adherence to Sophrona IT Security Policy & HIPAA rules for the safe guarding of personal health information (PHI) as applicable.

Desired Skills or Experience

- Experience with managing process change within a healthcare organization.
- Prior experience in an ophthalmology clinic.
- Proven IT technology project management experience
- Background in Practice Management or Electronic Records systems
- Familiarity with Meaningful Use, and other healthcare data exchange requirements and standards
- Experience with HIPAA and PCI secure systems.



Administrative

- Providing a weekly status report to Sophrona management.
- All client communications and emails are acknowledged or answered on a daily basis.
- Use internal company communication tools for support, project management, customer relationship management, bug tracking, etc. according to company best practices.

Organization

- Typically, the person in this role will work 40-50 hours per week, **from a home office.**
- Adapt to changing work priorities and a fast-paced environment while maintaining a professional attitude.
- Contribute to company vision and direction by helping improve technical practices, as well as choosing key technologies and issues to address as we grow.
- The person in this role may be asked to work additional hours in order to support important release deadlines.
- The person in this role may be asked to work special hours at night or on weekends in order to resolve urgent support issues.
- The person in this role may be asked to travel overnight in support of new client training, implementations, or conferences as needed.