



# TEAM LEAD, SPEAKER BUREAU

## SUMMARY/OBJECTIVE:

The Team Lead, Speaker Bureau is responsible for overseeing and support the team working with the client and the KOL (Key Opinion Leaders) and supports both parties from the primary stages of making contact throughout the booking and logistics process. This involves communication and management of fees, transport, accommodations, venue contracting, and timing, as well as communication between the speaker and clients. The Team Lead supports, trains and guides members of their Speaker Bureau team in a positive and productive manner and is a liaison between the Speaker Bureau team, Client Services and the client. This position is a client-facing position that requires excellent client service skills. The Team Lead has direct responsibility for managing all assigned programs and collaborating with other team members to ensure seamless coverage.

## ADDITIONAL RESPONSIBILITIES INCLUDE:

### Client Communication

- Send consulting/speaker agreement and W9 to advisor/speaker for signature
- Send signed consulting/speaker agreement back to client and track RSVP tracker
- Audit, review and approve all consulting/speaker agreements
- Hold weekly team meetings to identify workload, necessary communications and team challenges
- Communicate and maintain timelines and agendas
- Communicate with client and Client Service Manager (when necessary) concerning program logistics, process, compliance and business guideline changes.
- Train and communication process, compliance and business guideline changes to SBM and ASBM teams

### Internal Communication

- Filter communication between VPs, Client Service Managers, Operations, Compliance, Finance and IT
- Escalate all client concerns to the Client Service Manager to resolve
- Hold bi-weekly meetings with Client Service Manager to discuss successes and challenges with the account
- Hold Weekly Team Meetings to relay any necessary communications or updates
- Assist with the production of Quarterly Business Reviews presented to client
- Identify and provide weekly reporting to team to maintain program efficiency and accuracy
- Work closely with other client SB Team Leads to streamline overall SB processes
- Work closely with Director of Operations and Director of Onboarding to onboard and assess client SOPs and technology
- Collaborate with PA to ensure all inquiries are met and rectified

### Management

- Proficient in all software applications being utilized by CM group, Px group and the client

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The CM Group reserves the right to modify job duties or job descriptions at any time.***

- Supervise SBM/ASBM team schedules (i.e. WFH, vacation, sick days)
- Evaluate new employees at the end of their initial orientation to identify where they may need additional training
- Present as a positive role model to the team and serve as a resource to provide overall support to the team
- Serve as liaison between SB team, Client Services and manager to present process improvement ideas, efficiency and cost saving initiatives for the division and general feedback about the status of the team
- Provide onsite supervision of staff for training, development and mentoring as necessary
- Oversee the management of all onsite logistics and coordination

#### Materials

- Create communication templates in coordination with Creative Services and Director of Onboarding and Director of Operations
- Provide support and data for the creation of client QBR decks

#### Data Storage

- Manage Speaker list, contracts and slides
- Maintain accurate records for all programs, including logistical and financial details.

#### Finance

- Ensure all statements of work are executed correctly.
- Analyze the statement of work, client requests, program volume and how it relates to staffing needs.
- Approve HCP spend calculator creation
- Manage team to ensure to ensure budget numbers are updated in the appropriate systems
- Management of program close out in a timely and compliance manner for client budgeting and aggregate spend reporting.
- Collaborate with compliance and Finance to execute the audit process

### KNOWLEDGE, SKILLS AND ABILITIES REQUIRED

**ANALYTICAL SKILLS** – Ability to compare, contrast and quality check work and keen attention to detail. Can present numerical data orally and in writing or through graphics.

**COMMUNICATION SKILLS** – Superior interpersonal and customer service skills.

**COMPUTER SKILLS** – Proficient in Microsoft Office including Word, Excel and Power Point, especially spreadsheets, database and reporting tools. Knowledge of CVENT is preferred.

**DECISION MAKING SKILLS** – Ability to make clear, concise decisions and solve complex problems.

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**ESTABLISHING AND MAINTAINING INTERPERSONAL RELATIONSHIPS** – Establishing and maintaining an excellent relationship with the client and the participants is critical to the success of this position.

**ORGANIZATIONAL SKILLS** – Ability to organize, plan and prioritize work in a fast-paced work environment. Ability to achieve goals in a timely fashion.

**TRAVEL** – This position requires up to 25% travel to meet with clients. This may include weekend and evening hours.

### **WORK ENVIRONMENT, POSITION TYPE, EXPECTED HOURS**

This job is a professional office environment. This role routinely uses standard office equipment such as computers, phones, photocopiers, filing cabinets and fax machines.

This is a full-time position. Days of work are Monday through Friday, 40 hours per week.

#### **Required Education and Experience**

- Bachelor's Degree in communication or business-related field required
- 3-5 years of related work experience preferred (client service field, ideally speaker bureau or meetings and events)
- Knowledge of Cvent preferred
- Knowledge of Salesforce preferred
- Knowledge of Veeva preferred
- CMP preferred

#### **EEO Statement**

The CM Group is an equal opportunity employer. All qualified applications will receive consideration for employment without regard to sex, sexual orientation, gender identity or expression, race, color, religion, national origin, ancestry, genetic information, citizenship, age, disability, pregnancy, genetics, veteran status, or any other protected status under applicable federal, state, or local law.

#### **Other Duties**

Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities and activities may change at any time with or without notice.