



TEAM LEAD, STRATEGIC MEETINGS & CONGRESS

SUMMARY/OBJECTIVE:

The Team Lead, Strategic Meetings & Congress will work with clients to ensure the successful implementation of The CM Group products and services within the Strategic Meetings and Congress vertical. The Team Lead will also work as a liaison between the VP, Strategic Meetings and Congress, Client Services and team members to provide proactive consultation throughout program development and execution. This person will oversee the Strategic Meeting and Congress Managers to ensure their functions are streamlined for maximum utilization to support all Strategic Meeting and Congress accounts.

An ideal candidate will have a proven track record in employee and client management, client services, onboarding, and the ability to maximize resources, improve efficiency and establish consistency while delivering the highest level of client satisfaction.

JOB FUNCTIONS:

- Acts as a liaison between the department VP, Client Services and team members, providing proactive consultation throughout program onboarding, development and execution.
- Understand and translate client business goals into successful project plans to successfully execute programs.
- Identify and drive efficiency in the meeting/congress process by developing best practices and process improvements on an ongoing basis
- Ensure all statements of work are executed correctly.
- Analyze the statement of work, client requests, program volume and how it relates to staffing needs.
- Assist program managers to quickly identify potential issues and escalate them to the Client Service team to ensure the best possible experience.
- Assist in identifying all client requirements and collaborate with all team members to ensure proper communication and execution.
- Collaborate with the team and VP to provide data and information for Quarterly Business Reviews to Client Service Managers.

Client Communication

- Participate in weekly client meetings to identify workload, necessary communications and client team challenges
- Coordinate with planner to send attendee reports to Client Service Manager to provide to client
- Communicate with Client Service Manager (when necessary) concerning program logistics and changes

Internal Communication

- Filter communication between VPs, Client Service Managers, Operations, Finance and IT
- Escalate all client concerns to the Client Service Manager to resolve

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- 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 Team Leads and Directors of Onboarding and Operations to streamline overall efficiencies

Management

- Proficient in all software applications being utilized by CM group, Px group and the client
- Provide onsite supervision of staff for training, development and mentoring as necessary
- Oversee the management of all onsite logistics and coordination
- Supervise Meeting Managers 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 a liaison between Meetings/Congress team, Client Services and manager to present process improvement ideas, efficiency and cost savings initiatives for the division and feedback about the status of the team

Materials

- Create communication templates in coordination with Creative Services and Directors of Operations and Onboarding
- Create internal on-site program document templates
- Proof and give final approval on all materials

Finance

- Manage monthly close out process per client
- Oversee program reconciliations from program managers and ensure timely reconciliations

Vendor Management

- Review all hotel contracts and approve before being sent to the client

Registration

- Ensure all registration sites go through the proper review and testing before sites are launched

Data Storage

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- Maintain accurate records for all programs, including logistical and financial details

KNOWLEDGE, SKILLS AND ABILITIES REQUIRED

- Employee Management
- Superior employee management skills
- Client Management
- Project Management
- Streamlining Operations
- CVENT
- Analytic Skills
- Budgeting
- Concur
- Problem solving and crisis management skills
- Superior organizational and multi-tasking abilities
- Must possess excellent communication skills, both verbal and written; ability to handle complex matters over the telephone, and proven tact in dealing with others
- Knowledge and proficiency in job-related computer software and applications (MS Suite of Products, Adobe PDF). Specifically excel, power point and outlook.

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 with assistant from data team

COMMUNICATION SKILLS – Superior interpersonal and customer service and conflict resolution skills.

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

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

ESTABLISHING AND MAINTAINING INTERPERSONAL RELATIONSHIPS – Establishing and maintaining an excellent relationship with the client and the employees 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.

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.

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Travel

This position requires up to 25% travel to meet with clients. This may include weekend and evening hours. Some of the travel could be international.

Supervisory Responsibility

The Team Lead, Strategic Meetings and Congress will supervise the Assistant Strategic Meetings and Congress Managers and Assistants, focusing on quality assurance, customer service, and career development.

Required Education and Experience

- Bachelor's Degree
- 3-5 years of account management experience – preferably in the pharmaceutical industry
- Able to travel to client meetings
- Ability to manage a team
- Exceptional client and vendor management skills

Preferred Education and Experience

- CMP preferred
- Knowledge of CVENT
- Knowledge of Concur

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.

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