Reporting Specialist

Member of Client Services Team

Directed by: Strategic Services Directors
Reports to: Director of Client Services

Salary range: $40,000 to $50,000, depending on experience
Status: Full time, non-exempt

Love & Company

Love & Company, based in Frederick, Maryland, is a national leader in senior living marketing, research, branding, advertising and sales management. We take pride in having a top-notch team of creative marketing professionals with extensive experience in their specific areas of expertise as well as senior living.

Always Thinking

1209 N. East Street

Frederick, Maryland 21701

301-663-1239

fax 301-663-1553

www.loveandcompany.com

Position Overview

The reporting specialist has primary responsibility for generating standard and custom reports which summarize project and client data in a way that enables Love & Company to maximize marketing program performance for our clients. The reporting specialist is also expected to identify and develop new ways of tracking and evaluating marketing program performance, adding those new ways to our existing reporting processes.

In this role, the reporting specialist monitors and manages several data sources and provides regular and fast-query responses as needed that assist Love & Company with making informed decisions about clients' current marketing and sales trends, evaluating performance standards for client sales teams, and reporting progress against project goals. The reporting specialist provides critical support to the team by producing timely, consistent and accurate reports with strict attention to detail. The specialist is also expected to have an understanding of the data that enables him/her to readily identify errors and aberrations.

Primary Responsibilities

- Provide formatted and verified reports to client services team to support annual and quarterly planning processes, and monthly reporting needs
- Monitor weekly (and occasionally daily) campaign and sales results, reporting data regularly to the client services team
- Generate and provide regular (weekly, monthly, quarterly) reports of digital campaign performance to the client services and digital teams
- Assist the client services team with other analytical and support activities

Detailed Responsibilities

- **Provide formatted and verified reports to client services team to support annual and quarterly planning processes, and monthly reporting needs**
  - Learn the basic functions of each client's CRM (customer relationship management) program, including any unique facets of organizing and categorizing data each client may have, in order to be able to quickly and accurately pull needed data from each CRM
  - Pull/obtain lead and sales activity data from client CRM programs, organize into Love & Company's reporting systems, create/validate graphs and tables as needed, and assemble data and charts into appropriate reporting formats (Word, PowerPoint, Excel) for each client.
    - Data for quarterly planning is to be fully assembled and presented to client services teams a minimum of two weeks prior to each scheduled quarterly planning session.
    - Data for monthly reporting should be fully assembled and presented to client services teams no later than one week into each month, with lead times for selected individual clients potentially being faster based on each client's leadership presentation date
  - For client presales programs, provide quarterly demographic profile updates on priority depositors and/or 10% depositors
  - As requested by client services team members, pull data and develop custom/advanced reports and analysis for additional in-depth analysis of client program results
  - Identify any problems or inconsistencies in CRM data; work with senior sales advisors (SSAs) and client teams to resolve and correct issues
- **Monitor weekly (and occasionally daily) campaign and sales results, reporting data regularly to the client services team**
  - Monitor campaign implementation dates for all clients (provided by project management team), including both traditional and digital campaigns
  - Pull and distribute weekly call tracking reports for all clients using call tracking systems, identifying and calling out any items of particular note
  - Pull and distribute weekly lead generation and sales activity reports for all clients, identifying and calling out any items of particular note

    - As requested, for significant campaigns for selected clients, monitor daily call tracking and/or lead generation activity and report the results to the team

- **Generate and provide regular (weekly, monthly, quarterly) reports of digital campaign performance to client services and digital teams**
    - Obtain SEM/other digital reports from the digital team and distribute to the client services team
    - Pull data from MailChimp, identifying opportunities for campaign improvement and creating campaign reports for client services
    - Organize data provided by the digital team into standard client reporting formats (Word, PowerPoint, Excel)
    - Provide additional support for other regular reports, such as weekly and monthly Google Analytics (typically handled by digital team), as needed

- **Assist the client services team with other analytical and support activities as needed**
    - Develop and enter lead source codes and budgets in client CRMs
    - Order and cancel call tracking phone numbers
    - Learn Love & Company's mapping software, and—on request—develop lead, depositor and resident origin maps
    - Develop and maintain community averages report, which compares sales and marketing activity and metrics across our clients
    - When campaigns are complete, provide business development team with samples and results information for high-performing campaigns
    - Update mailing lists to reflect deletes and other changes
    - Proof documents in accordance with Love & Company guidelines

Qualifications

- Two years experience with data management and analytics. Experience working with senior living customer relationship management programs preferred.
- Excellent Excel and data analysis skills
- Dedication to error-free work and communications
- Excellent organizational and communication skills
- Basic knowledge of Macintosh computers, especially with Office 365 and database management. SharePoint experience a plus.

- Experience working in CRMs such as SalesForce, HubSpot, MatrixCare, and Enquire, a plus
- Bachelor’s degree preferred

Application Details

To apply, please email:

- A detailed letter explaining why you are interested in the position, the strengths and benefits you can bring to the firm, and the experience you have in the above areas
- Your resume
- Your recent salary history and salary requirements

NOTE: Resumes will ONLY be accepted with a cover letter and salary requirements

Please apply online at: https://loveandcompany.com/careers/

No phone calls, please.

Love & Company is an equal opportunity employer. All applicants will be considered for employment without attention to race, color, religion, sex, sexual orientation, gender identity, national origin, veteran or disability status.