EValue Powering financial insight

SENIOR ACCOUNT MANAGER

About Us!

EValue is a young, fast paced, growing FinTech company and the leading UK provider of financial planning and advice technology.

Working with over 80% of large financial institutions in the UK, EValue's white labelled solutions were used by approximately 200,000 consumers and financial advisers in 2017.

We have 70 talented integrated specialists, working across offices in Newbury and London

The benefits of joining our exciting team

As well as offering fantastic opportunities for career progression once established in your role, you will be joining a friendly and relaxed working environment where you will be continuously supported and encouraged to reach your full potential. We have an open culture where you are encouraged to find and fix problems and not to pass them on to some other team. We are a great environment for makers and builders.

Sound like you?

We have fantastic benefits, including

- 25 days annual leave, bank holidays, one extra 'company day' for Christmas plus the option to buy a further five days annual leave
- Generous company pension scheme – up to 10% employer contribution
- Bonus
- Private medical
- Long term disability and Life Insurance
- Study support policy
- Free parking
- A huge range of free hot and cold drinks
- Excellent fully funded company events
- Weekly yogalates classes (on return to office)
- Company football team and Table Tennis team (on return to office)
- Poker nights with pizza! (on return to office)

- The opportunity to support local charities through fundraising events organised throughout the year

Key Responsibilities

- Responsible for a portfolio of existing client accounts within the business and will be targeted to retain and grow those accounts.
- Retain and upsell clients by understanding client's business and requirements to ensure highest level of service and maximise and identify potential opportunities.
- Negotiate contract renewals (including price increases).
- Primary contact point for key client stakeholders.
- Invoice escalation management skills.
- Work with the Sales team identifying opportunities and managing the pipeline/activity in HubSpot CRM.
- Responsible for onboarding new services into existing accounts.
- Develop long-term relationships with this portfolio of clients, connecting with key business executives and stakeholders up to, and including, executive level.
- Maintaining regular contact with clients and lead quarterly business reviews with all managed accounts.
- Providing feedback to internal proposition teams to ensure customer needs are met.
- Creating and maintaining account plans for maintenance and growth strategies.
- Identifying account risks, creating 'At Risk' reports with clear correction action planning.
- Fully understand our proposition and be able to demo / discuss products/ services in detail and work with the propositions team to stay up to date.
- Manage the client cancellation/ renewal process running and implementing exit pathways where required.
- Communicate the progress of monthly/ quarterly objectives to CCO.
- Forecast and track key account metrics in HubSpot CRM.
- Maintain and develop industry and product knowledge by participating internal/ external training programmes.
- Maintaining positive industry networks via LinkedIn and/or other social media.
- Attend and represent EValue at events, marketing conferences, and other relevant industry opportunities when required.

Required Knowledge and Experience

- Proven account management experience – preferably from a related sector of financial services.
- Ability to understand and interpret client solutions in a clear and commercial manner.
- Effective communications / stakeholder management skills.

- Presenting and influencing credibly and effectively at all levels of the organisation, including executive and C-level.
- Presenting client solutions in a commercial manner.
- Managing internal stakeholders.
- Excellent active listening, negotiation, and presentation skills.
- Excellent verbal and written communications skills.
- Fluent in English (C1).
- Professional curiosity, proactive, and resourceful.
- Experience in delivering client-focused solutions based on customer needs.
- Self-motivated and able to thrive in a results-driven environment.
- Natural relationship builder.
- Effective time management.
- Critical thinking and problem-solving skills.
- Keen attention to detail and adherence to deadlines
- Team Player with the ability to adapt / “can do” attitude
- Client focused

Desirable Experience

- Proficient at Microsoft Office Suite
- Hubspot or other CRM

If you want to be part of a business that is looking to shape the future of financial services, contact us today!