

ACCOUNT MANAGER

ABOUT US

360 Dotnet created the software, 360 Lifecycle, for mortgage and insurance advisers. Whether it is arranging a mortgage or protecting clients against the unknown; we help businesses and clients succeed. We enable businesses to make a positive social impact, helping families to buy their homes and plan their financial future. Our customers choose us for our proven technology solutions, our expertise and our exceptional service.

Our software is trusted by some of the UK's best regarded financial advice brands. We have grown to become a major player in the mortgage intermediary software market; 20% of mortgage brokers rely on our software, our clients include leading names in UK financial advice, such as Alexander Hall and Quilter. Due to expansion, we are looking for an ambitious and motivated individual to join the Account Management Team.

RESPONSIBILITIES & DUTIES

- To ensure that the service provided to the end users of the systems is of the quality expected
- Establishes, develops and maintains strong business relationships with current Accounts and prospective clients to generate new business for 360 Dotnet.
- Point of escalation for your accounts
- Assisting in the consultancy offering of the business and identifying potential business needs within your Accounts
- Be an ambassador for 360 Dotnet ensuring that we continue to be seen in a positive light within our ever-expanding marketplace
- Provide regular updates to your line manager on project progress
- Produce documentation to the highest standards for external and internal clients
- To keep up to date with functional knowledge of 360 Dotnet Products
- Assist with on boarding & implementation of new clients
- Provide training support for new and existing clients
- To prioritise own workload, multi-task and manage own time effectively.
- To fully understand the needs of the end users and come up with solutions to their needs.
- To build strong relationships with users and clients through proactive communication.
- To be able to work in an ever changing, fast paced environment, and adapt to this quickly and efficiently.
- Carry out any other duties appropriate to the role.
- Desire to learn and develop

KPI'S & MEASURES

- Account retention in line with set targets
- Net growth of existing clients
- Optimisation of client system usage

SKILLS & EXPERIENCE

- 2+ years experience of working with SaaS products
- Understanding of the financial services industry
- Strong written and verbal communication skills
- Business development, prospecting and presentational skills
- Team player, who upholds professional integrity at all times.
- Technical understanding
- Organizational and planning skills
- Able to work under pressure
- Self-motivated and pro-active
- Open to travel around the UK

BENEFITS & OTHER INFORMATION

- Competitive salary and bonuses
- 25 days holiday plus bank holidays
- Hybrid working between home and our Leicester office
- Hours of work 9-5.30, Monday to Friday
- You will be reporting to the Business Development Director
- Healthcare
- Pension scheme
- Access to Perkbox discounts to help employees live and work better
- Be part of an ambitious and expanding business who are looking at new markets
- You would work for an award winning company. We won Best Mortgage Technology Provider in 2021 at the Mortgage Awards and we won Best Technology Provider at the Financial Reporter Awards in 2018 and 2020.
- 6,000 users of our CRM within financial advice industry

Please email your CV to David.smith@360lifecycle.co.uk