EValue Powering financial insight

Account Manager - FinTech IT Software Company

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 2019.

We have 80 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're 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
- Discretionary 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
- Monthly osteopath sessions
- Monthly car valeting
- Company football team and Table Tennis team
- Quarterly Poker nights with pizza!
- The opportunity to support local charities through fundraising events organised throughout the year

What you'll be doing

- Maintain and grow revenue from an existing customer base. Includes seeking out new opportunities within large complex organisations for the New Business team
- Regular onsite visits to strengthen relationships and correctly identify the dynamics of the decision-making team.
- Ensure high levels of customer satisfaction on current service and new deliveries
- Interact with EValue customer delivery teams to ensure smooth deliveries
- Report to sales management on activity and revenue forecasting
- Maintain contact management records to assist with client communications and marketing campaigns
- Market research and be vigilant of trigger events which could indicate opportunity within accounts.

Required Knowledge & Experience

- Inquisitive nature and genuine interest in what our clients do
- Ability to balance both the needs of the client whilst being an advocate of EValue
- Established expectation management skills
- Organized and able to run meetings with purpose, structure and energy
- Happiest when attending client sites and being connected to our customers
- Reliable, conscientious and committed
- Preferable experience in Asset Management, Financial Advice, Retail Banks, Wealth Managers or Financial Services software

Relevant competencies

Business and commercial Awareness – Has the ability to spot opportunities and contributes ideas to the business. Understands the business and acts on market information.

Thinking and Problem Solving – Has the ability to generate a range of options/recommendations and potential solutions.

Strategic Influencing – Has the ability to understand and choose appropriate strategies to influence.

Planning and Organising – Has the ability develop plans which pull together different departments/stakeholders.

Performance Focus Client Service – Strives to develop the service offer.

Performance Focus and Drive – *Creates their own measures of performance.*

Negotiation - Has the ability to work through financial and strategic differences with a customer in order to offer a resolution in order to close a sale.