

Job description

The primary role of the Account Manager is to account manage a portfolio of Adviser Firms. The position requires proactive account management, the ability to build strong business relationships and to professionally represent Novia Financial. The Account Manager is expected to retain existing business and generate additional revenue through up-selling and expansions of Novia's products and services, whilst providing excellent and personalised customer service.

Position Responsibilities:

- Develop and manage relationships with financial adviser firms based in your assigned regions.
- Developing and implementing account management plans for a number of key adviser firms and take ownership of those relationships.
- Ability to identify potential or significant relationship issues and provide the correct level of support and ensuring that remedial action plans are put in place to resolve.
- Identify Advisers that present an opportunity to increase their use of Novia.
- Building and maintaining internal networks and relationships across the company.
- Development of strong pro-active Adviser relationships to understand their business and where we can add value.
- Generating growth within the assigned Adviser panel by value-added solution sales of additional products and services to achieve set targets.
- Ensure the implementation is managed for new advisers, and plans are in place to support existing advisers with on-going initiatives and contact activity.
- Actively supporting and participating in the Account Management team to achieve team objectives.
- Raising and owning escalations to satisfactory completion, reporting on any trends and identifying training, system or process gaps.

Personal Attributes:

Skills and knowledge:

- Previous demonstrated experience in account management roles is essential.
- Experience of selling products and services to an existing client base would be beneficial.
- Proven track record in developing and seeking out new business opportunities.
- A sound knowledge of the issues and challenges facing the Financial Services sector.
- A passion for identifying, developing and executing new ideas.
- Able to build and maintain strong client relationships, working in partnership to achieve business goals.
- Networking skills – be able to create, develop, and preserve relationships with both clients and staff members.
- Excellent Project and Time management skills – be able to manage your time and projects effectively, prioritising important tasks.

- Comprehensive and technical knowledge – be able to demonstrate an extensive awareness of the services or goods offered by the company.
- Good spoken and written communication skills.

Attitudes and behaviour:

- Positive and can-do attitude.
- Ability to challenge existing practices, suggesting solutions, improvements and new initiatives.
- A team player, who is comfortable working closely with other members in the team, but is also willing and able to work autonomously and establish their own priorities and objectives.
- Comfortable working with other departments, bringing together people from different areas of the business.
- A passion for delivering excellent customer service.
- Confidence, tact and a persuasive manner.
- Take ownership for personal development.

Typical education and work experience:

A levels plus experience.