

## About Plum Software

Plum Software, which is part of the global Praemium Group, develops and provides CRM and financial planning software. It has been successful in the UK Independent Financial Adviser market for more than 20 years. Now with growth in its product suite and expansion into the international market we have openings in our centrally located offices in West Midlands.

This is a fantastic opportunity to join the team for someone who has exceptional enthusiasm and willingness to make a difference.

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### The Position

Role: Product Support Analyst

Working as part of the experienced and knowledgeable support team this position reports to the Operations Manager. It is based in the Coventry office, providing a range of support aspects to clients who use the software system and facilitating the continued growth & support of the client base all within a fast-paced but passionate environment.

Key responsibilities and Accountabilities

- Dealing with client queries through a query management system
- Problem solving for and with clients
- Backup scheduling
- Dealing with a selection of 3<sup>rd</sup> parties
- Monthly reporting
- Limited administrative duties

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### Competencies

The ideal candidate will have:

- A calm, systematic and methodical approach to addressing clients' issues.
- A good telephone manner and interpersonal skills, with an approachable attitude.
- A willingness and ability to learn the in-house software systems well enough to technically deliver 1st and 2nd line support in a clear and effective way to clients.
- Excellent verbal and written communication skills.

As is the case with most support centres, there are times when it is vital to be able to prioritise and manage cases efficiently and cope with pressure at critical points. It is essential to meet deadlines.

The successful candidate will be able to:

- Effectively troubleshoot issues
- Have an analytical attention to detail
- Work as both a team, and individually
- Use their own initiative to resolve issues

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### Experience & Qualifications

Experience:

- Understanding and knowledge of MS Office (365) & Windows systems
- Experience in 1st/2nd line support
- Knowledge of CRM systems an advantage
- Knowledge of wealth management back office systems would be considered beneficial

To be considered for this position, please send a copy of your CV to [chris.tooley@praemium.com](mailto:chris.tooley@praemium.com) and we will be in contact in due course.