

Account Manager, Financial Advice Software, Coventry

Plum Software

As Account Manager, you will promote and support Praemium's products and services to our strategic partners and to the broader IFA market, through developing business relationships and targeted sales activity. Responsible for achieving sales targets and ensuring business objectives are effectively implemented, this role will also be integral in assisting in gaining feedback from the client base and the market to continue to develop a market leading solution and allow team members to have direct influence on product and technology development items. Praemium's next-generation platform delivers the only truly integrated Managed Accounts platform in the market, providing access to one of the most diverse client and prospect pools available to an Account Manager. Working with Praemium, you will also gain invaluable global knowledge with great peers, technologies and markets. We offer a fantastic working environment and a unique opportunity for team members to broaden their knowledge, improve their skills and further their career.

Key Responsibilities and Accountabilities

The successful candidate will:

- » Identify, generate and qualify new business leads
- » Support the business in planning and delivering on targets
- » Work with financial advisers to understand their business model, current client base, approach to client segmentation, risk profiling and CRM system requirements
- » Grow the number of software licenses by developing new and existing relationships
- » Identify cross-selling opportunities for Praemium's award-winning investment platform
- » Assist in preparation of presentation materials and deliver them internally and externally
- » Schedule, prepare and deliver training sessions with intermediary clients
- » Ensure delivery of proposals and marketing documents to prospective clients
- » Monitor and understand the position of our competitors and trends of the market to help to strategically develop our business
- » Build trusted and credible relationships with other teams within the business to ensure we exceed client expectations
- » Ensuring the integrity and culture of our firm by adhering to risk and compliance policies

Experience, qualifications and attributes

The successful candidate will have:

- » Knowledge of Financial Advice Software and Practice Management Systems
- » Experience with Microsoft Dynamics 365 would be highly regarded

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Company Registration: 2865446 VAT Registration: 100 1037 06

- » An understanding of the financial advice process and understanding of the financial services industry, including the competitive and regulatory landscape
- » Experience in, and understanding of, investment platforms and products and financial planning software
- » A deep understanding of the financial services in industry, including the competitive and regulatory landscape
- » Proven ability to build relationships at all levels of a business
- » An ability to communicate effectively (verbal and written) to a range of stakeholders and build trusted relationships which benefit the client and the business as a whole
- » Proven client relationship management skills
- » A motivated self-starter with service experience
- » Project management skills and a continuous improvement mindset » Ability to multitask, whilst also handling ambiguity and able to handle and prioritise multiple implementations concurrently
- » Detail orientated and precise
- » Have proven record of ability to negotiate resolutions to complex issues and define project scope
- » Excellent presentation skills, with exceptional verbal and written communication skills
- » Comfortable working in an Agile environment, adopting a consultative and cooperative approach to your work

About Praemium:

Established in Australia in 2001, Praemium has grown to be a market-leading provider of investment platforms, investment management, portfolio administration and CRM solutions with offices in London, Coventry, Jersey, Australia, Armenia, Dubai, Shenzhen and Hong Kong. The world's leading financial advisers, trustees, investment managers, institutions, accountants, family offices and product providers use Praemium to manage or administer over £63 billion worth of investment globally across more than 475,000 accounts.

What we offer:

We believe what makes us unique and a very attractive organisation to work for, in addition to the financial reward and benefits, is a combination of:

- » Our organisation and our global scale;
- » Our platform, our products, our clients and our leadership;
- » The framework and initiatives we've put in place to support your personal growth and continuous learning opportunities;
- » The work we do, and we love doing!
- » Our relationship with our peers, the trust and respect we have for each other;
- » Our diversity, inclusiveness and the opportunity to bring your whole self to work

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