

United Kingdom Jobs Expertini®

National Account Manager

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Company: Twenty7tec

Location: United Kingdom

Category: other-general

Twenty7tec transforms financial advice through technology. We partner with businesses of all sizes who share our ambition to simplify, streamline and digitise financial services in the mortgage and wealth markets. All our partners are different, so our technology can be customised to meet both the needs of the business and the needs of the client. As such, we need talented people to join our growing team and are excited we have new opportunities to do so. We are now looking for a National Account Manager to join our team. In this role you will be responsible for nurturing and maintaining excellent relationships with our key partners to achieve company revenue targets across all channel product lines. This will be delivered through exceptional customer service, communication and developing a strong understanding of the Velocity platform that can be confidently communicated to our customers. This individual will be expected to represent the business at industry level and contribute internally on department and business strategy, monthly and annual reporting, planning, risks, opportunities and budgeting/forecasting. Your responsibilities will include: Support with the budgeting and forecasting process, as well as individual target setting for your team (where applicable) Ensure the continued growth of revenue, system adoption and develop close partnerships with customers Accurately report on revenue, team and customer activity, the sales pipeline and agreed KPIs Develop account plans to make sure key accounts are aligned to the business strategy Confidently and professionally present and sell to clients Twenty7Tec products and services Achieve and exceed revenue targets Record and manage activity through the internal CRM system Manage a team of sales staff (where applicable). Ensure workloads, performance and general line manage

duties are maintained to a high standard. Identify and create leads for colleagues across the customer and sales teams Effectively and confidently communicate the product roadmap Gather customer feedback to shape the product roadmap and drive additional revenue Develop an in-depth understanding of key industry trends, market developments and the competition Identify new and/or underserved areas of the market where there is commercial value Work with key accounts to improve internal processes Create a communication plan to support account management framework Support with the creation marketing collateral to help position key business messages Act as an escalation point for complaints by our partners. Travel to meet clients from time to time as the role requires The above is not an exhaustive list of duties and you will be expected to perform additional or other duties as necessary to meet the needs of the business.

About you: You will have: A minimum of 2 years B2B/B2C sales experience Experience of working within the Mortgage Industry and or IFA Industry A minimum of 2 years account management experience in a SaaS environment (preferably CRM / practice management) Self-starting, driven, tenacious, with the ability to identify and close business opportunities Extremely strong team player with the willingness to go above and beyond. Strong negotiating, consultative relationship management and problem-solving skills Strong organisational skills with a proven ability to handle multiple priorities Effective communication skills across our business and with our customers

Benefits You'll be joining a company who looks after their people, Twenty7tec is currently ranked as a Best Technology Company to work for and also hold a Best Companies Outstanding company to work for official accreditation. Annual bonus (performance-based) Flexible working location (hybrid) Increase on length of service up to a maximum of 28 days holiday plus bank holidays Pension scheme Enhanced Maternity and Paternity Leave Death In Service insurance Financial coaching and salary advance platform Cycle to work scheme Learning and development opportunities including a Udemy for Business Licence Wellbeing programme, including access to Mental Health First Aiders. Health care plan (dependent on length of service) Dog-friendly office In-person and remote social events throughout the year

About Us The power and benefits of great financial advice are unquestionable. Twenty7tec, through our Velocity platform, is committed to designing and building exceptional technology, that supports mortgage, protection, and wealth advisers in delivering exceptional client outcomes. Our technology is used by advisers, lenders, product providers, and financial institutions to underpin the effective delivery of financial advice to millions of consumers in the UK. On a daily basis, over 16,000 mortgage, protection and wealth advisers utilise our

Velocity platform. Twenty7tec is rated “Outstanding to work for 2024” by Best Companies, is in the Top 50 Technology Sector companies, and Top 75 in the South West region. Twenty7tec is a diverse employer, and we understand that everyone is unique. If you require additional information or reasonable adjustments to help you with your application or interview, we would be very happy to assist. If your application is successful and you are invited to an interview, we will provide you with an information sheet giving insight into our interview process, so you know what to expect.

Recruitment Process

The target start date for this role is July 2024. Applications for this role may require a short online assessment to establish competency in certain skill areas. If your application is successful, you will be invited to a short telephone screening call with a member of our HR team. This is an informal conversation to find out a little more about you and your expectations ahead of potentially moving on to a formal interview. If you are invited to an interview, this may be carried out at our Bournemouth office, or online via a video call depending on your location. Interviews are conducted with the line manager for this role. A second interview may be required depending on the specific job role and may be attended by a member of senior management where required. Don't worry though, we're all very friendly!

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