Account Manager
Job Description

Background

Harlequin is a family run software company supplying not for profit organisations with fundraising and accounting software.

Key Aim:

Harlequin aims for all clients to be advocates of the system. To achieve this, the role is designed to proactively manage clients covering all Harlequin Software's products (principally a Fundraising CRM and separate Accountancy package). It is vital to ensure client needs are being met and provide informed solutions on product updates to achieve this. This is a home based role, but would need to be able to come into the office at least once a week.

Key Skills / Experience:

- Communications: Excellent written and verbal communications, able to build and maintain relationships with a varied client base.
- Data Analysis: Strong eye for detail, able to work comfortably with data in various software systems.
- IT: Use of Outlook, Word, Excel, Powerpoint, Sharepoint and Teams and an intuitive ability to use software systems.
- An understanding or experience of the following would be advantageous but not essential:
  - CRM / Finance software account management.
  - Third sector.
- Organisational Skills: The ability to manage work to deadlines is essential.

Key Responsibilities:

- Proactively manage accounts both over the phone and attend client sites to develop long lasting relationships.
- Add value to Clients by understanding their operations and provide proactive support to achieve their goals.
- On-board new clients, ensuring they transition as smoothly as possible, working closely with the Harlequin Project Manager and Training Manager.
- Support the Customer Success & Training Manager in the creation and delivery of User Events to maintain maximum client engagement.
- Attend industry conferences and events.
- Pro-actively learn Harlequin systems to ensure good level of understanding of systems and product offerings.
- Provide information to clients on new system development and encourage regular training in key areas of the system.
- Ensure the client base is aware of all product and service options available to them. Provide quotations for these when requested and up to maximum revenue.
- Monitor any issues that occur, working closely with the Support / Development team to ensure that these are resolved at ground level and that the client is satisfied with the result.
- Provide feedback to the Support and Product Development team as to requests for system development from the Client.
- Build strong relationships with all internal and external partners and suppliers that can ensure the successful delivery of support and change requests
- Provide first-line end-user support to all clients when the Support team require cover.
- Manage tickets as required in ZenDesk
- Ensure CRM records of allocated accounts are maintained.