

Internal Account Manager & Sales Co-Ordinator Job Description

Background

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

Key Aim:

To provide a proactive internal account management and sales administrative support to the Harlequin Account Managers, Sales and Support Teams.

Key Skills & Knowledge:

- Communications: Excellent written and verbal communications, able to build and maintain relationships with a varied client base.
- IT: Use of Outlook, Word, Excel, Powerpoint, Sharepoint and Teams and an intuitive ability to use software systems.
- Organisational Skills: This is a varied role and the ability to manage work to deadlines is essential.

Account & Sales Co-Ordination:

- Log orders on the client CRM and distribute client Licence Agreements
- Log services delivered such as training, consultancy etc.
- Send and log quotations for training and software modules for existing clients.
- Discuss training requirements with clients, manage bookings and produce training literature for the Training Manager.
- Manage and update the Clients CRM database, ensuring all client contacts are up to date.
- Manage invites and guest lists for Harlequin User Groups and Workshops via Eventbrite.
- Manage Software User Guides, updating with changes when software enhancements are applied.
- Assist in the preparation of regularly scheduled reports (e.g updated client list).
- Develop and maintain a filing system, both online and hard copies as required using MS SharePoint.
- Manage invoicing and payments, producing aged debtor reports and chasing late payments as necessary.
- Manage third party and supplier renewals.

Internal Account Management

- Pro-actively manage allocated accounts (AM plan to be devised).
- Ensure CRM records of allocated accounts are maintained.
- Update all key conversations / emails on Harlequin CRM and ensure that the next point of contact is entered in your calendar.
- Pro-actively learn Harlequin systems to ensure good level of understanding of systems and product offerings.
- Provide regular contact to your account base to ensure Harlequin support and understand their requirements effectively.

- Provide information to clients on new system development and encourage regular training in key areas of the system. Ensure that the client base is aware of all of the product and service options available to them. Provide quotations for these when requested and monitor / follow up, to ensure maximum revenue. Escalate to external account management team as required.
- Escalate client issues to support team or external account management team as required.
- 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.
- Ensure that if upgrades have gone out to them they have been actioned and the correct people have the change log.
- Provide first-line end-user support to all clients when the Support team require cover.
- Manage tickets as required in ZenDesk.