

JOB DESCRIPTION

Job title	Account Manager
Location	Milton
Department	VFO
Line manager job title	Manager

Overview

This role owns a portfolio of client accounts and is responsible for delivering an excellent service to those clients using the latest cloud accounting technology. Services include bookkeeping, management reporting, credit control and general business support.

Key accountabilities

- Manage each client account, ensuring timely completion of accounts preparation and management reporting for clients.
- Liaison with clients, ensuring their needs are met.
- Day to day support and supervise Trainees and Account Associates with their work, ensuring they are meeting the clients needs and are learning in their roles.
- Schedule all processing and bank reconciliation work, as prepared by Trainees and Account Associates.
- Ensure payment runs are sent to the client in good time, and make the approved payments to meet client deadlines.
- Complete management accounts in a timely manner, ensuring they are sent to the client by the agreed deadline, or 25th of the following month.
- Complete VAT returns to ensure filing can be achieved by the last working day of the month.
- Maintain the workflow / task management systems is kept up to date at all times with accurate and timely data.
- Drive/progress the use of preferred software for all services.
- Maintain a client portfolio of up to £12k of monthly fees.
- Target fee recovery of 100%+ on all clients.
- Adopting a continuous improvement mindset, identify ways services could be improved for our clients making PEM more efficient and improving margins.
- Upsell VFO services and cross sell services across PEM to drive margin improvement.
- Keep your line manager updated at all times with relevant information and ensure any risks / errors are highlighted in a timely fashion.
- Maintain client satisfaction to a high standard at all times.
- Adhere to client response times in line with agreed VFO Standards.

Person Specification

- AAT qualification
- Good communication skills
- Proficient at all Microsoft Office apps, specifically, excel, word and PowerPoint
- Robust knowledge of Xero and other cloud software
- Ability to juggle multiple priorities
- Excellent time keeping and time management skills
- Adhere to PEM values and VFO Standards at all times
- Proactive mindset