

Client Relationship Manager

We're seeking a Client Relationship Manager to join our team! You will be responsible for managing key relationships and helping drive product adoption among new users that join our platform.

Primary Responsibilities:

- Develop processes to monitor all on-boarding projects while developing new client relationships during product implementation stage.
- Help drive product adoption, share best practices and implement growth and optimization strategies for maximum value and success within customer user base.
- Engage external client users in formal training settings and provide expert day-to-day servicing on all product aspects.
- Contribute to product research, service-improvement initiatives, and other projects as needed as well as provide feedback to the software development team for technical-related product enhancements.

Skills/Qualifications:

- Financial Services; Finance, Accounting, Economics, or Information Systems degrees preferred. (Recent graduates welcome). Previous work experience in the Financial Services / Finance industry is a plus.
- Hold a deep understanding of investment management and/or financial services in order to anticipate the context of user's needs.
- Aptitude and willingness to gain complete knowledge of software capabilities in order to provide excellent service to platform users.
- The ability to prioritize tasks based on the needs of the business and switch gears quickly while maintaining strong attention to detail.
- Strong customer support focus and the ability to exercise sound professional judgement while working with both external users, and internal operational and finance technical teams.
- Proven organizational skills, and the keen ability to understand and juggle different business priorities that provide the most value to the organization.
- Proficient skills in Microsoft Excel.

Please send your resume to Kelly.Fitzpatrick@advyzon.com