

Job title	Customer Account Executive
Reports to (job title)	Commercial director
Location	Hybrid: home and Westminster, London office
Tenure	Permanent, 5 days per week
Salary	£24,000 - £26,000
Closing date	Rolling recruitment
About us	Company <a href="#">slide deck</a> and <a href="#">website</a>

### 1. Purpose of the job

We are seeking a talented Customer Account Executive to play an important role in the growth of the business. You will be managing a portfolio of our Benefit and Budgeting Calculator clients, specifically overseeing our Citizens Advice and housing provider clients, and supporting the sales team with telephone prospecting for new business. You will be a key link between the sales and operations teams where you will feedback positive customer testimonials and escalate queries and feedback internally for it to be immediately addressed.

To be successful in this role you will need to be a self-confident, enthusiastic, positive person, who can use their energy, organisational skills, and proactive drive, to meet renewal targets. You will need to be able to approach and engage existing customers with confidence and professionalism, and have the capacity to analyse and manage problems before or as they arise. You will have the ability to simply communicate complex policy concepts and help support users of the software. You will be delivering our training sessions and supporting customers online, on the phone and in person, to all levels of seniority.

The position is offered as a permanent contract subject to a 6 month probationary period with significant opportunities for progression.

### 2. Organisation structure

The Customer Account Executive will work in the sales team and report to the Commercial Director.

### 3. Main accountabilities

The role will be split evenly between customer support and creating new business leads.

#### Customer support

- Support our customers through the onboarding and training process, identifying potential churn, and proactively approach renewals.
- Phone calling is an essential part of the client management process, you must be able to identify client satisfaction and dissatisfaction.
- Feed positive customer testimonials to the Sales and Marketing team, and escalate queries and feedback internally for it to be immediately addressed.
- Conduct needs analysis to determine prospects' potential objectives, and potential objections.
- Allocation of incoming queries.
- Reporting on usage and customer feedback.
- Maintaining up to date information in the sales/ops tracker.
- Onboarding and offboarding process.
- Delivering/supporting training.

#### New business

- Build and cultivate relationships by setting up meetings for the sales team and managing user demos/trials.
- Initiate and conduct follow-up communications to move opportunities through the sales funnel.
- Work with the Commercial Director and the rest of the sales team, to develop and grow the sales pipeline to meet revenue goals.
- Manage data for new and prospective clients in Pipedrive, ensuring all communications and activities are logged, and that information is accurate.
- Support the sales team with administrative tasks.

### 4. Person specification

Skills and experience
<p>Essential</p> <ul style="list-style-type: none"><li>• You will need excellent questioning and critical listening skills, and a sound appreciation of timeliness here in order to represent the customer well internally.</li><li>• Some experience of telephone prospecting or sales more generally</li><li>• Experience setting up customers from new and inheriting prospects and</li></ul>

customers from colleagues

- Experience at delivering product demonstrations and information

Desirable

- Managed customers for a software/consulting product
- Managed public sector clients
- Managed clients of different sizes, particularly smaller organisation
- Worked from home/on the road before
- Owned and managed a product's customers

## About us

### **Policy in Practice believes in the power of data and technology to change lives**

*We are a team of policy experts who deliver data driven insight, products and services to the sectors focused on the nation's financial well-being. We empower people to make more informed decisions and take action to build financial independence.*

We believe the government policy can work more effectively and help people towards greater independence. Policy is often complicated, confusing and changing. This makes areas like the welfare system difficult to understand, to communicate and administer. We simplify the welfare system for individuals and organisations. We help people understand how government policy affects them so that they can make decisions.

Local authorities use our analytics to see how individual households are affected by the combination of national and local policy changes, now and in the future. Our powerful tech engine models how the policies of different government departments affect thousands of families on low incomes. We use a scientific approach to data visualisation to drill down to identify individual households most in need, show organisations where they should focus support programmes and help them track the effectiveness of their support.

We support over 80 organisations to improve the future for many people across the country. We can track the living standards of over two million households, 1 in 8 of those who use the welfare system, via anonymised data sets. We were founded by one of the architects of Universal Credit and our analysis is widely covered in the national media.

Our mission is to reduce poverty which we do through our:

- [Benefit and Budgeting Calculator](#) which gives personal benefits and budgeting support, helping people to grow their financial resilience without needing to be a benefits expert
- [Data analytics](#) services which help councils target resources more accurately, spend money more effectively and meet their statutory obligations
- [Council Tax support scheme modelling](#) which helps councils to design the best support scheme they can to meet their local priorities

We strive to reach every low-income household to bring positive change to people's lives, now and in the future. We can only do this through our continued growth and development, and by recruiting the best people, so that we have the biggest influence on the impact of policies.

### **Working at Policy in Practice**

We are committed to creating an environment of collaboration, support and inclusion. The operations team is office based, but we encourage team members to work from home 1-2 days a week, especially when they need to focus on specific projects.

We are operating under hybrid working arrangements. New starters are paired with a senior colleague who will provide mentoring and support. Normal working hours are 09.00-17.30, but there is flexibility in these times that can be agreed with your line manager. We offer 25 days of paid annual leave, membership of the NEST pension scheme and additional benefits such as free eye tests.

Watch [interviews with us about what it's like to work at Policy in Practice](#).

### **How to apply**

Please send your CV with a covering letter that clearly outlines your suitability and your interest in the post to [jobs@policyinpractice.co.uk](mailto:jobs@policyinpractice.co.uk) as soon as possible. The role will close when filled.