

Job Description Client Success Manager

Responsible to:	Head of Client Success
Salary:	£27,500
Pension:	Matched contribution up to 4% of gross salary
Hours:	Full time
Promotion opportunity:	Head of Client Success
Location:	100% remote / home based

Purpose of role:

Client Success at NestEgg means helping our responsible lender clients grow their loan books. The Client Success Manager (CSM) supports this by ensuring rapid on-boarding and configuring software to best deliver a client's growth strategy. The CSM will provide ongoing support and offer interventions to ensure clients benefit from all NestEgg services.

Client success is measured by the growth in client loan books, increases in NestEgg's recurring revenue and low churn rate. The Client Success Manager will be instrumental in ensuring that NestEgg becomes the software of choice for responsible lenders.

On-boarding

Managing on-boarding and implementation

- Pick up from sales new clients for on-boarding, make introductions and outline the on-boarding process.
- Maintain dialogue with clients, appraising them of on-boarding timeframes, progress and required actions.
- Record all on-boarding actions, by client.
- Follow up clients and service providers to maintain pace for on-boarding.
- Issue contracts and End User Agreements via e-signature.
- Check credit union website, ICO and other relevant areas for compliance.
- Complete due diligence checks.
- Ensure data tests pass in good time.
- Organise and lead on-boarding calls with third parties and clients.

- Ensure the on-boarding process continually improves and document it.
- Liaise with engineering team to support technical work for on-boarding.
- Document changes to policy rules, workflow and other NestEgg products for each client and summarise changes in a central depository.
- Ensure client's access software documentation and get feedback on content.
- Be aware of information security issues and inform the CTO of any risks for ISO27001 compliance.

Client success

Work with clients, helping them achieve organisational goals

- Obtain baseline data from clients from which future growth will be measured.
- Provide clients with data and insights, showing how they are improving, or not. In case of the latter, work with the Head of Client Success to find solutions.
- Understand client pain points, identify how NestEgg software can address these and measure improvement.
- Document feature requests originating directly from clients or user groups.
- Provide benchmarking data with other NestEgg clients and share best practice.
- Support User Groups, issuing invites, booking premises, documenting discussions and producing follow up materials under guidance from the Head of Client Success.

Client support

Lead the support function, providing accurate and quick responses to queries.

- Possess an in-depth understanding of the NestEgg platform to provide consultative best practice for loan assessment.
- Direct users to documentation.
- Assist clients as they use NestEgg software for the first time.
- Provide front line support, answer queries.
- Refer more complex queries to the Head of Client Success.
- Review and update documentation.
- Collate Frequently Asked Questions and write template responses.
- Ensure day to day support activities comply with Data Protection and Information Security Policies.
- Review client queries and / or complaints and concerns and improve all aspects of the client experience with NestEgg.

Retention

Ensure clients remain active users of NestEgg software

- Provide an excellent, professional and prompt service to clients.
- Proactively monitor usage data to identify risk of attrition, feedback to the Head of Client Success and work together to draw up solutions.
- Ensure clients renew software where time-limited contracts are in place and encourage them to adopt additional solutions appropriate to their needs.
- Encourage an energetic fan base for products, finding ambassadors willing to share software benefit and value, by way of personal recommendations and / or case studies.
- Identify, help create, and maintain automated reports and dashboards providing insight into client success.

Administration

Support the smooth running of NestEgg

- Develop, maintain and monitor effective administrative systems
- Liaise with service providers, including as Credit Reference Agencies and other partners, e.g. Open Banking and core systems providers.
- Provide administrative support as required.
- Ascertain the needs of clients and to ensure the resources of NestEgg are adequate and sufficient to meet these demands.
- Maintain accuracy of client contact information.

NestEgg growth

Support the continued expansion and growth of NestEgg

- Ensure that NestEgg has a high and well-respected public profile.
- Work with sales support events and other relationship-building events.
- Help identify opportunities for growth, including new clients.
- Feedback on marketing campaigns.

General

- Make a positive contribution to the development of an effective team, supporting colleagues in ensuring that NestEgg has a cohesive team working towards a shared vision of success.
- Undertake such other duties that may be reasonably required.

- Keep under review own training needs.
- Become familiar with and adhere to all NestEgg policies and procedures, especially ISO27001.
- The offices of NestEgg are remote, requiring home working. However, there will be a need to travel to regular meetings typically held in the North West but also London and Northern Ireland.
- Ensure the effective management and security of NestEgg assets including laptops, online data sources

Equal opportunities

NestEgg will provide equal opportunity for employment to all individuals regardless of race, colour, age, national origin, physical or mental disability, history of disability, ancestry, diet, citizenship status, political affiliation, income, exclusion factors, education level, religion, gender, transgender, gender identity, gender expression, marital status, status as a parent, sexual orientation, veteran status, genetic information or other factors prohibited by law. NestEgg will prohibit harassment based on any of these factors. All staff must proactively work to promote equality of opportunity.

Last reviewed: March 2022

Person specification Client Success Manager

To apply please send us your CV with a document explaining how you meet each point of the person specification below using not more than 100 words for each of the 13 areas:

1. Subject Matter expertise in lending with extensive experience of interpreting credit reference agency data.
2. Understanding of credit risk management.
3. Experience of working directly with customers and / or stakeholders, preferably business to business.
4. Experience within the responsible lending sector.
5. Excellent IT skills with an ability to quickly learn new software applications and develop expertise in its operation.
6. A self-starter able to work on own initiative, identify objectives, prioritise work, handle and working under pressure, judge when to consult and take personal responsibility for day-to-day client success operations.
7. Expertise with data and reports, including an ability to find correlation and causation in data sets and identify trends.
8. Excellent relationship management skills; empathetic, professional and comfortable with difficult conversations.
9. Project management skills to manage on-boarding and other projects.
10. Knowledge of the issues facing people suffering financial exclusion.
11. Effective communication skills with an ability to earn the trust of the NestEgg client base.
12. A team player with willingness to learn and develop through on-the-job experience.
13. Ability to plan ahead and contribute to NestEgg's growth.

About the company

NestEgg helps people improve their financial health by saving more and borrowing less.

Razor-sharp focus

By maintaining a focus on what we do best, we can continue to develop a best-in-class [decision engine](#) and [mobile app](#) with regular [new features](#), based on our client priorities to drive growth.

A scientific approach

We test hypotheses through experimentation. We analyse data to inform software development and configuration. For example, we used 10,000s of lending decision data to set fair, [evidence-based rules](#) for [County Court Judgments](#) and [defaults](#). As a result, more people can access affordable credit, without a matched rise in bad debt.

Outcomes matter

Our software's success is constantly measured. Like a social dividend. This is the amount of money our lender-clients save their borrowers by avoiding using high cost short term credit.

Our [five steps to better financial health](#) are constantly reviewed to ensure that our lenders can deliver on their inclusion goals, for example by tracking improvements to credit scores, reductions in debt and fewer missed payments. Our data shows [huge growth lending](#), or a [reduction in bad debt](#).

Focused on clients, not funders

NestEgg was bootstrapped by its co-founders, [Ben](#) and [Adrian](#). The company is funded by revenue from clients and has been profitable from day one. This means we are incentivised to give 100% focus on customer needs. External funding has its place and we're certainly not against it in principle. But it can be a distraction from the interests of clients.

Flexibility

Our software is flexible and so is our company. For example, NestEgg has been remotely distributed from day one. It doesn't matter to us where our employees are based. The ability to work remotely means a better work / life balance and enables NestEgg to find the best talent.

Read more: <https://nestegg.ai/blog/>