

## **JOB DESCRIPTION**

<b>Title</b>	<b>Upshot Account and Support Manager</b>
<b>Employer</b>	Upshot Systems CIC
<b>Compensation</b>	£28,000 - £32,000 per annum plus generous benefits
<b>Place of work</b>	Hybrid working split between: <ul style="list-style-type: none"><li>• House of Sport, 190 Great Dover Street, London, SE1 4YB</li><li>• Remote work from home</li></ul> The expectation would be that the successful candidate would spend 2 days per week at the House of Sport with Upshot and the remainder working remotely. At times depending on business needs there may be a requirement for more days to be worked in the office. This role also includes periodic travel to client locations to build relationships and deliver training.

The Account and Support Manager will be responsible for working with the Upshot team to deliver high quality customer service to all clients. They will manage the implementation of the Upshot system for new clients, deal with customer support queries and manage contract renewals for existing clients. The role enables the candidate to work closely with a range of audiences, stakeholders and different charities, sport and non-sport, to help and support them to collect good data and better measure the impact of their community work.

The successful candidate will be managing high-level and detailed relationships with clients and this role will see the successful candidate as a primary point of contact for both new and existing clients of which they are responsible for.

Beyond their core responsibilities, the Account and Support Manager will also have the opportunity to develop the business more broadly, through identifying potential business development opportunities, partaking in ongoing marketing exercises, discussions around the development of the system and engaging with our wider Monitoring, Evaluation and Learning Services.

The role is varied, providing the unique opportunity to learn the many different skills needed to run a tech start up, under the umbrella of a social enterprise. They will help develop Upshot's online help guides/resources, deliver online and face-to-face training, host workshops and assist with improving efficiency within the team.

## **Account and Support**

### Client Onboarding and Training:

1. Manage the implementation of Upshot for new clients, including analysing clients' needs and adapting the system to meet their requirements.
2. Deliver training to groups of new and existing Upshot users in-person and online.

### Support:

3. Provide a high-quality customer experience, supporting on designing and producing support materials, such as online tutorials, guides and documents.
4. Provide high-quality user support, resolving complex queries and ensuring high client satisfaction.
5. Proactively troubleshooting and offering tailored solutions to clients' needs online, by telephone or in person.

### Renewals:

6. Conduct regular check-ins with clients during the license period to ensure they are satisfied and utilising the product fully.
7. Manage the renewal process, ensuring clients renew their contracts annually and identifying opportunities for upselling or upgrades.

### General Account Management:

8. Build relationships with and take full ownership of allocated & identified new and existing clients.
9. Monitor client accounts to ensure they are active and engaged, taking proactive steps to address any potential issues.

### Collaboration and Coordination:

10. Work closely with the Head of Account Management and the wider Account Management team to maintain excellent relationships with all clients.
11. Work with internal teams, such as Product, to highlight client issues and improve the overall client experience.
12. Collaborate with other team members to ensure accurate and complete information is captured in CRM (Customer Relationship Management) and Finance systems.
13. Provide support to the Upshot team for client-related tasks.
14. Lead or support on projects to improve internal processes and implement them successfully within the wider team.

## **Additional Responsibilities**

### Business Development and Marketing

15. Take a proactive role in identifying and securing new business opportunities to expand our client base. This could include upselling services to existing clients, generating referrals and identifying new clients.
16. Support the Upshot team in the delivery of marketing material, organising events and campaigns to maximise sales opportunities.

### Monitoring, Evaluation and Learning Services

17. Support on the creation of sophisticated external reporting mechanisms, enabling clients to visualise and communicate their impact effectively
18. Advise clients on best practices in data collection and impact measurement, and support internal efforts to continually enhance client's MEL needs
19. Support on the delivery of MEL workshops both in-person and online

### Software development

20. Support the Upshot Product team to carry out user testing and make recommendations for enhancements to the system's features and functionality.
21. Advise the Upshot team regarding improvements to the system to assist with sales and existing customer satisfaction

### Other

22. Provide support to the rest of the Upshot team where needed.
23. Undertake duties as can be reasonably expected to ensure the smooth running and efficiency of the Upshot team.
24. Always carry out duties and responsibilities in compliance with Upshot policies.

## **PERSON SPECIFICATION**

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working remotely. At times depending on business needs there may be a requirement for more days to be worked in the office. This role also includes periodic travel to client locations to build relationships and deliver training.

*Ideally, we're looking for someone with the following characteristics. However, it is not essential to possess all.*

Knowledge of:

1. Web-based software applications and data management.
2. The not-for-profit sector, including Local authorities, Housing Associations, Universities and Colleges.
3. Sports development and/or sport for development including National Governing Bodies, County sports partnerships and sport clubs.
4. MEL (Monitoring, Evaluation & Learning) impact measurement, data collection.
5. Microsoft products, particularly Excel to an advanced level.

Experience of:

6. Account management and customer service in a tech, SaaS or charity environment.
7. Leading on external projects with a wide range of stakeholders from planning to execution
8. Delivering group training to a range of audiences – in person and online.
9. Providing client and user support, especially on digital tools.
10. Handling, analysing and visualising data to produce actionable insights.
11. Building and maintaining strong relationships with clients and partners.
12. Communicating clearly and succinctly to a range of audiences through various channels.
13. Managing workload independently to balance the competing pressures of customer service, implementation and training.

Other qualities might include:

14. A huge desire to learn, develop quickly and provide collegial support to other members of the Upshot team.
15. Creative ability, problem solving skills, energy and enthusiasm.
16. Familiarity with data visualisation tools (e.g PowerBI, Google Looker Studio and Tableau).
17. Fluency in English required and additional languages desirable but not essential.