Customer service and a sales / Account Management background. Optional IT, Software or Support experience looking to progress.

Intro

A customer success representative is required to join BTCSoftware as part of a growing Customer Success Team. BTCSoftware is award-winning Accounting and Tax software company, and we provide software to Accountants in Practice, Business and Individuals to meet their tax and compliance needs.

The role will be within our new Customer Success team, which will service our customers, from onboarding, customer training and generating growth through upsell/cross sell opportunities.

The individual candidate will need to demonstrate the successful achievement of targets and customer service in previous roles and manage their diary and duties whilst answering inbound and making outbound telephone calls.

We are looking for a driven person who has a professional and a more than willing attitude to help our customers. The ideal candidate will also need to proactively contribute and work closely with colleagues to help build a successful team.

The Role

The Customer Success role will be varied and will evolve as the team becomes more established. The team will manage new and existing clients, and the role will involve onboarding, training and managing customer needs after purchasing the software through our new business team. Our main goal is to provide all the necessary material to ensure a smooth transition over to BTCSoftware and offer a professional service to maintain customer loyalty and retention.

Key duties

- The onboarding and training of new customers.
- Inbound and outbound telephone calls.
- Respond to customer queries via telephone and email.
- Retain and grow customer accounts through upselling and retention tools, such as training, establishing needs from products, and pro-actively contacting clients to build repour and serve their needs.
- Liaise with other teams to solve issues.

About you

- Customer Service, Account Management background or Support.
- Minimum of 2 years' experience
- Demonstrate successful achievement of targets and customer service in previous roles.
- Strong verbal and written communications skills.
- Confident in managing your diary and workload.
- Team player, happy and willing to help colleagues in the team and other departments.
- Positive in adapting to change.

- Excellent at dealing with people on the phone and via email.

Ideal but not necessary for the role

- Experience working for a software company.
- Accounting background.
- Experience in training.
- Industry knowledge of Accounting and Tax Software.

Benefits

- Twenty-five days of annual leave.
- Quarterly bonus scheme.

BTCSoftware is currently operating remotely with staff working from home for the foreseeable future, so the ideal candidate will need their own space and quiet environment to work within.

We would also require that the person commute once or twice a month to a business location should we return, situated around the Surrey KT15 area.