

**Title:** Account Manager

**Location:** New York

**Reports to:** VP, Head of Customer Success

**Salary range:** \$80,000 to \$175,000

### **Company Description**

GoldenSource (<https://www.thegoldensource.com>) is a fast-growing FinTech firm and a leader in data management software solutions for the financial services sector. Headquartered in New York, GoldenSource also has key offices in London, Milan and Mumbai, with more than 400 staff worldwide. Having been acquired in 2022 by private equity firm Gemspring, GoldenSource is in an exciting phase of investment and rapid growth. GoldenSource offers an international working environment, a positive corporate culture, the opportunity of professional development and attractive employee benefits. Industry Recognition: GoldenSource consistently receives industry recognition and awards for a wider range of capabilities than any other firm in our space. The awards include Best Data Management Platform and Best Cloud-Based Data Management Solution.

We serve top-tier clients located in 12 countries with offerings including EDM Software, Professional Services and a rapidly growing Managed Services offering – GoldenSource OnDemand.

### **Job Description – Primary Responsibilities:**

The Account Manager To have complete ownership and accountability for ensuring revenue and customer retention within the assigned accounts.

### **Key Responsibilities:**

- To support and drive the adoption of GoldenSource suite of products according to customers' needs and help them **realize business value** from adopting GoldenSource suite of products. To plan for client trainings and ensure that customers are aware of product features, directions and strategy.
- To develop **new business opportunities** in existing accounts to meet upgrade, up-sell and cross-sell revenue targets. Create and own up-sell and cross-sell opportunities - products and OD services (entire sales cycle). Increase overall revenue for each assigned account.
- To create, maintain and execute **account plans** for assigned accounts and coordinate with appropriate internal domain experts for delivery
  - Account History
  - Case Study/Use Case/Architecture (understand and document the customer's business use case(s) and the application of GS products - product usage)
  - Engagement Management - map and align each client by business line and geography, maintain stakeholder maps for accounts etc.
  - Agreement Summary and Renewals
  - Opportunities (up-sell/cross sell)
  - Finance and Invoices and Renewals (own/assist finance on renewal negotiations/contracts)
  - Quarterly **plan of action** (builds a coverage and execution plan)

- To uncover and **mitigate any risk(s)** that threatens our customer's growth, satisfaction, or renewal. Resolve issue escalations, if needed, working closely with our professional services, support, product and development teams. Keep Exec Management updated (e.g. to raise "Red-flags" and "Escalate" proactively both within and our customer management)
- To forecast and track **key account metrics** viz. **net promoter score (NPS)**, renewal, upgrades, and pipeline - etc.
- Be the **second level of escalation** for all verticals

### Relationship Management

- To build **long-term, trusting relationships** with various stakeholders (mainly all key decision makers and influencers) within a customer organisation. To ensure relationships is maintained at all levels between GoldenSource and customers.
- To strengthen **customer relationships** through regular engagements and face-to-face meetings
  - To own Relationship - Exec Management meetings and SteerCo
  - To ensure that in-person meeting with Exec, Product, PSG, OD managers are scheduled regularly with clear objectives
  - To reach out and try to create connect points with other verticals within the customer organization
  - To reach out and establish relationships with business/ops users/managers within existing customers
- To build a solid base of **referenceable customer** contact(s)

### Internal Coordination

- To complement and supplement the **Sales Organization** on all cross-sells and keep them updated (on the account).
- To engage with **Project Managers** and stay up-to-date with the project schedule and budget
- To engage with **Support Account Managers (CSM)** to ensure that client incidents are addressed and resolved with SLA (ticket/incident review)
- To engage with the **Delivery Leads** to ensure that all subscribed services are "Green"
- To provide leadership steer as required

### Qualifications, Experience & Other Requirements:

- 7+ years overall financial services
  - Experience at Banks, Asset managers, Insurance, Endowments, FinTech vendors (selling into Capital markets), Exchanges, Fund Admins, Custodians, Brokers, Ratings agencies etc.
  - **At least 2 years of account management experience**
- Bachelor's Degree (Information Technology / Computer Science / Analytics/ Finance). Masters from a renowned university will be an added advantage (optional)
- Excellent communication skills (verbal and written), presentation and the ability to communicate/work with people at all levels/backgrounds
- Ability to develop collaborative relationships with customers, partners, and developers across the business at all levels.
- Able to manage relationships with peers and managers as it relates to support and services
- Must be a proven performer and team player that enjoy challenging assignments in a high-energy, fast growing and a dynamic workplace
- Must be a self-starter who can work well with minimal guidance and in a fluid environment

- US citizen or PR i.e. no sponsorship

GoldenSource Corporation is an equal opportunity employer.

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