

Ready to rocket?



**We're ready for lift off,
what's your next mission?**

Client Onboarding Success Co-ordinator

Location: Thames Valley – Maidenhead

Company: Wilson Partners

Leading Accounting, Tax and
Corporate finance business

An exciting opportunity to join an ambitious, award winning financial services firm with big ambitions for the next five years.

Developing and maintaining successful client relationships is crucial to our continued success and to achieving our ambition to become a top 25 accounting firm by 2026. That's why we are looking for a Client Onboarding Success Co-ordinator to work closely with our client advisers to ensure the seamless integration of new clients to our business ensuring everyone receives a first class experience.

Who we are:

At Wilson Partners, we provide a suite of integrated, innovative and value-added accounting, tax and corporate finance solutions that empower businesses, investors and private clients to make better decisions.

We don't do grey suits, operate in silos, or spend all day counting beans. On the contrary, we operate out of a vibrant open plan office in the centre of Maidenhead, all our directors are fully engaged in the business and we're passionate about client success, because if our clients thrive, our people thrive too.

We don't want to just make up the numbers, we're a business that makes a real difference to the relationships we build and helps to make life count for our people and our clients.

Each one of us is dedicated to challenging, inspiring and supporting our clients to live the lives they want and enjoy the success that will benefit those they care about and the wider community.

We have grown organically year-on-year since our inception in 2008. In September 2021, we took investment from a family office to accelerate our growth with a view to creating a top 25 accounting, tax and corporate finance business with 5 years.

Your new role:

The core of your role will be managing the transition of new clients, ensuring an engaging and consistent experience. This means getting the clients set up on our systems, communicating with them and their respective client manager within our team, ensuring a smooth transition and setting high standards that they can expect throughout their partnership with us.

You will also be involved with prospective clients, helping with pre-qualification, identifying and understanding their needs and setting up meetings with the relevant staff member.

We have considerable growth plans, which will include making a number of acquisitions of other accounting, tax and advisory businesses, so we are looking for an individual that can not only adapt to our processes but identify and implement areas for improvement.

This is an exciting role for someone with great communication and administrative skills, ideally with an understanding of our sector.

Job Description

Job title	Client Onboarding Success Co-ordinator
Main purpose of job	<ul style="list-style-type: none"> • Provide prospects and clients with an engaging and consistent experience from first contact to being fully on-boarded. An experience that demonstrates our values and sets us apart from our competition • Remove non fee earning activities from the team which would be more effectively performed within this role
Duties & key responsibilities	<ul style="list-style-type: none"> • Prospect qualification for new enquiries that come into the business • Setting up calls / meetings with relevant WPL staff member to progress lead • Management of the on-boarding process • Setting clients up on internal systems • Identifying improvements that can be made to the on-boarding process • Database management (Fibre, IRIS) • Sales and other reporting • Ad hoc project work
General responsibilities	<ul style="list-style-type: none"> • Ensure confidentiality of sensitive data • To act in accordance with the business' values and competency framework
Skills & abilities	<ul style="list-style-type: none"> • Confident and clear communicator – confident speaking to new prospects on the phone • Clear understanding of what excellent client service looks like • Ability to communicate with all levels of staff and to work across teams • Attention to detail • Pro-active
Knowledge & experience	<ul style="list-style-type: none"> • Prior experience in a professional services business would be an advantage • Experience of managing a process from start to finish • Experience in providing high levels of customer service • Knowledge of Microsoft Teams preferred • Knowledge of the sales process useful
Personal attributes	<ul style="list-style-type: none"> • Willing to embrace change and new ideas • Desire to get things right first time • A good team player demonstrating commitment and respect to other team members • Self-motivate