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CLIENT CONCIERGE

Position Summary:

The Client Concierge is will be responsible for managing client relations and providing exceptional customer service to clients. They will be a key point of contact for clients in relation to administrative matters. They will be responsible for ensuring that client needs are met and their expectations are exceeded.

Reports to:

Practice / Administration Manager, Management Team, Partners and Client Managers

Responsibilities:

1. Be the main point of contact for clients, both new and existing.
2. Develop strong relationships with clients and get to know them on a personal level.
3. Proactively communicate with clients to ensure their needs are met and expectations are exceeded.
4. Assist clients with onboarding and engagement by scheduling meetings, preparing engagement agreements, and sending welcome emails.
5. Manage client touchpoints by sending out client referral and special event gifts on behalf of the firm and ensuring that client touchpoints are implemented and executed.
6. Ensure that the firm's client service charter is clearly communicated to both clients and staff, and staff behaviours reflect the firm's approach to client service excellence.
7. Advise the management team immediately of any situations or circumstances that require immediate attention.
8. Answer incoming calls regarding workflow, billing, service level and general concerns.
9. Update the client relationship management (CRM) database after each contact.
10. Draft status emails that reassure clients and vendors of the firm's goodwill and professionalism.
11. Proactively audit the firm's client list to detect any clients that have not been contacted in a timely manner.
12. Implement the firm's formal client feedback process, collate and circulate results for review, and contact clients on an annual basis to find out about their experience with the firm and address any questions or concerns that come out of that process.
13. Work with the management team to stay updated on any changes in policies or processes that will affect clients.
14. Assist partners and managers in identifying areas of potential service to clients and follow up as required.

For further information, visit: https://cpdforaccountants.com.au/product/client-concierge/

Position Requirements:

1. Bachelor's degree in business, marketing, or a related field.
2. 2+ years of experience in customer service or client relations.
3. Excellent communication skills, both written and verbal.
4. Strong interpersonal skills and ability to develop relationships with clients.
5. Ability to prioritize and manage multiple tasks simultaneously.
6. Knowledge of client relationship management (CRM) systems and processes.
7. Ability to work independently and as part of a team.
8. Strong problem-solving skills and ability to think creatively.
9. Ability to maintain confidentiality and handle sensitive information.
10. Proficient in Microsoft Office Suite and other relevant software applications.

Key Performance Indicators:

1. **Client satisfaction scores:** Conduct regular client satisfaction surveys to determine how well the Client Concierge is meeting the needs of clients. This can include metrics such as NPS (Net Promoter Score), CSAT (Customer Satisfaction), or CES (Customer Effort Score).

2. **Client retention rate:** Measure how well the Client Concierge is able to retain clients by tracking the percentage of clients who renew their engagement agreements or continue to use the firm's services.

3. **Response time:** Track how quickly the Client Concierge responds to client inquiries, whether it be via phone, email or in-person meetings. A prompt response time is critical to maintaining positive client relationships.

4. **Number of client touchpoints:** Monitor the number of touchpoints made with each client, including phone calls, emails, in-person meetings, and other forms of communication.

5. **Referral rate:** Track how many clients are referring new business to the firm. A high referral rate indicates that the Client Concierge is doing an effective job of building strong relationships with clients.

6. **Revenue generated:** Monitor the amount of revenue generated from clients managed by the Client Concierge. This KPI can help determine the effectiveness of their client management strategies and identify areas for improvement.

7. **Process adherence:** Track the adherence to the firm's client management process and policies to ensure consistency in client management practices.

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