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| Key Account Manager (Payroll Software Providers) |
| B2B Proposition |
| Nest Experience |
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**Organisational Overview**

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| Nest is a great government delivery success story. Established in 2010, Nest has been a critical pillar of the government’s automatic enrolment programme, with a public service obligation (PSO) to accept any employer wishing to use the scheme to discharge their automatic enrolment duties.  From a standing start, we have delivered a high quality, low cost pension scheme, open to all, which has not only delivered on its mission, but helped to drive up standards and best practice across the industry. Now with over 12 million members, Nest is playing a critical role in helping people save for their retirement many of them low to moderate earners who may be saving for the first time and moving jobs frequently.  Nest now occupies a place in the market as a major Master Trust, a sector that has grown following the introduction of automatic enrolment and that we believe has great potential for delivering pensions to mass market consumers for many years to come, leveraging scale to offer low cost, modernised services in the context of strong Trustee governance.  To best serve our diverse customer base, it’s important that Nest has an equally diverse workforce and  promotes an inclusive culture. This is in line with the organisation’s values and ensures that Nest is a corporation fit for the future. |

# The role

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| The role of the Key Account Manager (KAM) (Payroll Software Providers) is to manage a portfolio of identified accounts within the Payroll Software Provider client bank. The KAM will have responsibility for ensuring that business within their portfolio is retained and developed to maximise revenue opportunities and member outcomes in line with Nest’s corporate objectives.  The Key Account Management service is expected to be delivered through a mix of face to face and online meetings as appropriate for each relationship. |

# Scope and deliverables

## Accountability

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| * To manage a portfolio of identified key accounts, ensuring that business is retained and developed to support delivery of key B2B acquisition, retention and growth targets * The jobholder is expected to make day to day decisions that enable them to deliver against their retention and development targets * The jobholder is expected to identify and manage risks associated with their own portfolio * The jobholder is expected to deliver against a set of key performance measures for the team * To provide appropriate customer feedback to colleagues across B2B and NX to assist the development of appropriate products, experience, marketing & Value Propositions for Nest’s Payroll Software Provider customer segments * To attend in-person and virtual events, as necessitated by the Head of B2B Technical & Strategic Partnerships, to support engagement with the segmented Payroll Software Provider audiences * To ensure that all compliance and regulatory guidance is complied with, including (but not restricted to) ensuring that no financial advice will be provided to our customers via the jobholder * To work collaboratively with colleagues across Nest, B2B and NX to support the delivery of wider Nest, NX and B2B objectives * To manage travel and business expenses in the best interests of our members and in accordance with Nest policy * This role has no budget responsibility * This role has no direct reports |

## Deliverables

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| * To have and maintain an in-depth knowledge of Workplace Pensions, the DC market and appropriate adjacent markets (eg. payroll services, employee benefits) * To retain and develop an identified portfolio of accounts, ensuring an in-depth understanding of each account * To achieve all targets set by the head of B2B Technical & Strategic Partnerships for the allocated customer portfolio. Successful achievement of targets will be evidence based * To work at creating, identifying and realising opportunities to generate additional profitable revenue for Nest. For retention objectives this will include developing a full understanding of the account, building trust and respectful working relationships. Being commercially aware of current trading positions of key accounts is expected * Work closely with managed accounts, creating effective communication channels with key customer stakeholders and taking responsibility for leading on the resolution of all customer issues, including provision of technical support in how to use NEST systems. Liaising, as required, with colleagues within Nest and strategic partners, for example TCS * Ensure account development plans for each client are current and contain relevant information, including profitability status and future revenue identifiers. * Ensure that all appropriate administrative tasks are fulfilled on time and to high standards (CRM, reporting, travel and expenses claims etc) * To make full use of technology to ensure that account management is delivered in the most cost effective and efficient manner, maximising appropriate delivery through remote channels * To gather accurate and detailed market intelligence in a form that can be used to drive further product and service improvements and marketing campaigns * Work with the wider B2B and NX teams to develop content for, and participate in; customer site visits, new business pitches and onboarding projects for new, high value customers to Nest * Contribute subject matter expertise to assist the development of tools and content targeted at supporting Nest’s propositional objectives for customers * Represent Nest at external events and network effectively, building and delivering compelling presentations to a variety of audiences * Keeping job knowledge up to date by participating in educational opportunities; reading professional publications and maintaining personal networks and maintaining an agreed personal development plan |

## Relationships and autonomy

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| * This role reports to the Head of B2B Technical & Strategic Partnerships * The jobholder is expected to be able to manage themselves, their work and time effectively * The jobholder will be expected to work closely with the other KAMs and wider Nest and NX colleagues * Externally the jobholder will be expected to interface with a wide range of stakeholders related to the portfolio of accounts they manage |

# Role requirements

## Experience and technical skills

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| * The jobholder is expected to have or develop a detailed working level of expertise of the Nest systems and processes. They will use this to ensure that they can provide a high degree of support to customer accounts where required * Significant auto enrolment, defined contribution and trust-based pensions knowledge plus a good understanding of the payroll market and how it fits into NEST’s delivery model * A clear view of the different types of customers Nest has and different engagement approaches required for each, with specific experience within the Payroll Software Provider sector * Ability to understand profitability models and how they relate to an account management framework * A skilled and confident presenter, comfortable in front of large audiences * Skilled in relationship management, influencing outcomes and objection handling * Preferably experience of meeting and exceeding revenue and retention targets * Diligent in maintaining CRM records in a compliant manner * Highly proficient in Microsoft Office programmes and comfortable with leveraging technology to maximise effective delivery through remote channels |

## Personal attributes

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| * Highly motivated and self-managed, able to work without supervision to an agreed framework * A team player who will share knowledge with colleagues and contribute to team objectives * A customer centric mindset * A positive outlook, and an ability to find solutions not problems * An effective planner with good time management * Someone who takes personal responsibility for their own development * Comfortable with a changing and evolving environment and not afraid to try new approaches * Technically minded with excellent attention to detail |
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## Working pattern

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