



Designation: Associate Director - Customer Success

Qualification: Master's degree (Finance), CFP or any post-graduation in Finance

Experience: Overall 10-12 Years, minimum 5-7 years of experience in SaaS, Fintech, or Wealth management background

Location: Mumbai

Company Profile:

Unidel is founded in 1973 and is focused on sectors being reshaped by automation. The vision is to be a Digital Transformation group across Buildings, Factories, Wealth, and Skilling.

Get to know more at www.unidel-group.com

Asset Vantage (A UNIDEL company) is built for family offices by a family office and technology group and recently featured in Forbes review, AV is an award-winning global SaaS technology product delivering cloud based one-stop solution to track family's complex wealth. Founded in 2011, we have a strong customer presence in North America, Middle East and India and expanding fast in other key geographies as well.

If you see yourself as a strong analytical mindset and problem solver with a passion to build scalable SaaS products and services around them, then we are looking for people like you to build out our highly capable team.

Learn more at www.assetvantage.com/careers/

JOB Description:

- Proven work experience as a Customer Success Manager or similar role
- Experience working with brand image and promoting value through customer experience.
- Exceptional ability to communicate and foster positive business relationships.
- Technical skills required, as they relate to the use of the product or service. Sound knowledge on different types of investment structures (custodians, banks, etc.) and the type of transactional feed coming from these. Identify how the platform can be improved to match the feeds.
- Build long-term relationships with customers and their family office teams.
- Responsible for communication with global customers. Ensure product features/roadmap are effectively communicated with existing customers.
- Train the trainer (client team) to onboard/reconcile historical as well as ongoing data entry to sure it matches with investment and holding statements.
- Implement a metrics-driven approach to performance management, rewards, and recognition.
- Ensure the proper use of CRM and other internal tools for effective management.
- Coordinating periodic communication with the product team on upgrades / new features / bug fixes.
- Understanding issues / bugs on the system and ensuring these are filed and tracked for resolution on Redmine.
- Identifying possible feature upgrades and optimizations based on client interactions and personal hands-on experience while working with client teams and soliciting feedback.
- Build the strongest, most collaborative working relationships with internal stakeholders in operations, product, and engineering to execute and advocate on customer requirements.
- Should have ability to manage multiple customer accounts.
- Familiar with investment accounting and performance management, MS Office
- Expertise in investment management and accounting.
- Experience in managing a diverse group and training each according to company standards.
- Capable of communicating with a diverse range of individuals, across functions
- Strong Excel and Presentation skills.
- Clear & concise written and oral communication.
- Excited to travel, meet customers, and build life-long relationships.

HR Team – Asset Vantage Systems

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