**Research and Development Advisors UK Limited**

**Operations Team**

**CLIENT MANAGER JOB PROFILE**

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| Job Title | Client Manager |
| Reports To | Head of Operations |
| Background to R&D Advisors | R&D Advisors UK Limited was founded in 2019 by Kevin Auchoybur, who has eight years' experience in advising clients on their eligibility for R&D tax credits and has successfully claimed a large number of refunds in that time for SMEs carrying out research and development.<br><br>The taxation system in the UK is complex and Kevin leads a team which has a deep and thorough understanding of R&D tax credits legislation, and experts in identifying whether a business qualifies for R&D tax credits, and what expenditure qualifies for the scheme.<br><br>R&D Advisors UK Limited is looking for a Client Manager to join their expanding team. To maintain their high service levels, there is now an exciting opening for a Client Manager who will join their Operations Team. |
| Main Purpose of the Job | The purpose of the Client Manager role is to develop an understanding of R&D Tax Credits Legislation in order to effectively manage and develop client relationships across a portfolio of sectors.<br><br>The Client Manager role, while effectively managing client relationships, will work closely with R&D Directors, Business Development team, Quality Assurance team and Accounts Teams in order to contribute to core business functions for e.g. completion of Client R&D Project Information Reports.<br><br>Specifically, the purpose of the Client Manager will be to focus on;<br><br>● Effectively maintaining and developing client relationships<br>● Ensuring R&D client project data is collected in a timely manner using available tools and templates<br>● Contributing to the completion of Client R&D Project Information Reports<br>● Liaising with other teams, and sharing of information in order to help achieve core business objectives |

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| Key Responsibilities | **Main Duties and Responsibilities**<br><br>● Play an integral part in the R&D Operations Team<br>● Manage a portfolio of existing client accounts.<br>● Maintain relationships and communication from client introducers (such as Accountancy referrals).<br>● Regularly touch base with the client via face to face, telephone and email communication<br>● Ensure client Professional Service Agreements are regularly maintained and negotiated.<br>● Ensure all project information for R&D Client Reports are effectively managed in a timely manner such as obtaining company history, and professional competency statement information.<br>● Develop a schedule to ensure that all client accounts are managed effectively.<br>● Regularly book and attend client meetings to extract project data using the R&D Advisors Client Questionnaire Framework.<br>● Manage and coordinate post project data collection meetings to include management of client digital recordings (BigHand software), project photos/supporting information, client questionnaire write ups (by QA team)<br>● Regularly update outcomes from client meetings using available tools such as Excel or CRM<br>● Ensure post meeting project data is disseminated in a timely manner to other team members.<br>● Maintain regular contact with clients, sharing success stories and claim updates.<br>● Understand a wide range of sectors where R & D could be applied such as the technology, construction or engineering sectors.<br>● Have a credible, sophisticated and intelligent approach to client management. |

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| | • Attend a variety of member hospitality and networking events such as Essex County Cricket Club.<br>• Demonstrable first-class communication and presentation skills along with the ability to liaise at senior levels within a wide variety of companies.<br>• Undertake Compliance and Anti Money Laundering training where appropriate.<br>• Operate within the HMRC R&D guidelines for R&D Tax Credits.<br>• Demonstrate ongoing knowledge and understanding of R&D Tax Credits Legislation |