Job Description

Job Title: Client Manager
Location: Milton, Cambridgeshire
Department: Virtual Finance Office (VFO)
Line Manager Job Title: Assistant Director

Overview

The client manager is a client-facing role within our Virtual Finance Office (VFO) team at PEM. The role is responsible for leading client relationships, owning service delivery across a portfolio of owner-managed businesses (OMBs), start-ups, SMEs, not-for-profits and scaling businesses, and ensuring the consistent delivery of high-quality management accounts, VAT returns, cashflow forecasting and other financial reporting services.

The role holder will act as a trusted advisor to clients, providing timely financial insight, identifying opportunities to add value, and ensuring the delivery of an exceptional client experience. They will take ownership of onboarding new clients, proactively manage risks and recoveries, and work closely with internal teams to drive service quality, efficiency, and commercial performance. With ambitious growth plans as part of our 2030 strategy, this is a fantastic opportunity to shape your role, develop new skills, and grow with the team.

Key accountabilities

- Lead client relationships for a portfolio of clients, acting as the primary point of contact and taking overall ownership of service delivery.
- Build and maintain strong, trusted client relationships, developing a deep understanding of each client's business, challenges, goals, and future plans.
- Oversee the preparation, review, and delivery of management accounts, VAT returns, cashflow forecasts, and other financial deliverables.
- Ensure all deliverables are accurate, high quality, and completed within agreed deadlines.
- Take ownership of onboarding new clients, ensuring a smooth transition, clear expectations, and an excellent early client experience.
- Oversee processing and production work, working closely with internal teams to ensure efficient workflow, consistency, and timely delivery.
- Identify, manage, and resolve risk areas proactively, taking ownership through to resolution.

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KRESTON GLOBAL

1875 Accounting Limited t/a PEM.
A full list of Partners can be found on our website.

Company Registered Number: 17014349
Registered Office Address: Salisbury House, Station Road, Cambridge, United Kingdom, CB1 2LA
Country of Registration: England

Regulated for a range of accounting and investment business activities in the UK by the Institute of Chartered Accountants in England and Wales. PEM Insolvency Practitioners are licensed to act in the UK by the Insolvency Practitioners Association and when acting as receiver or administrator contract without personal liability.

- Drive improvements in recoveries through regular fee reviews, commercial awareness, and confident client conversations.
- Maintain regular client touchpoints and ensure all interactions are accurately recorded in the CRM system.
- Proactively seek and monitor client feedback, including NPS where appropriate, to improve client satisfaction and service quality.
- Develop a strong understanding of the firm's wider services and build an internal network to support cross-selling opportunities.
- Build and maintain an external network to enhance client service and identify additional value opportunities.
- Work predominantly with high-complexity clients, providing tailored financial insight and strategic support.
- Mentor, support, and develop trainees and junior team members within the production team.
- Liaise effectively with processing and production teams to ensure smooth service delivery and accountability.
- Identify opportunities for software, process, and system improvements that enhance client efficiency and service quality.
- Support wider firm objectives and contribute to the growth and development of the VFO team.

Person specification

- ACA / ACCA qualified, or equivalent.
- Significant experience in management accounts and client portfolio management within practice, outsourcing, or a similar client service environment.
- Proven experience leading multiple client relationships across multiple sectors and delivering to tight deadlines.
- Experience preparing or reviewing VAT returns and cashflow forecasts.
- Strong client relationship, stakeholder management, and influencing skills.
- Commercially aware, with the ability to identify opportunities to improve recoveries and add value.
- Excellent technical knowledge with strong attention to detail.
- Experience in Xero and cloud accounting/reporting tools are essential; proficiency with other finance, workflow or reporting platforms would be an advantage.
- Proactive, solutions-focused, and able to manage risk effectively.
- Strong communication skills, both written and verbal.
- Ability to mentor and develop junior team members.
- Highly organised, with the ability to manage a large and varied workload.
- Confidence using accounting, reporting, and CRM systems, with an interest in improving processes and technology.
- Experience working autonomously and taking ownership of client service delivery.