



Job Title: Client Excellence Coordinator - CEC (Remote)

Job Type: Full-Time

Location: Work from Home (Preference for candidates in Raleigh-Durham, NC, the Big Bend region of Florida) or in the Eastern Standard time zone.

Company Overview: Lillyfield Accounting Solutions is a premier accounting firm. It is a dynamic, fun, and fast-growing organization that thrives on innovation, collaboration, and adaptability. We offer full-service bookkeeping and fractional CFO/Controller services to a variety of clients in multiple industries including non-profits.

Position Summary: The Client Excellence Coordinator (CEC) is a client-facing role that connects business development, client success, and firm operations. This position plays a critical part in supporting the sales process, guiding clients through seamless onboarding, ensuring ongoing satisfaction, and providing essential assistance to internal team members. Reporting directly to the COO, the CEC acts as a key liaison between the accounting team and senior leadership, helping to align daily operations with the firm's broader goals.

Success in this role requires a client-centered mindset and the ability to build strong, trust-based relationships while maintaining exceptional attention to detail and accountability. The ideal candidate is highly organized, adaptable, and skilled at balancing client-facing responsibilities with internal support in a fast-paced, remote environment. Equally important is a commitment to teamwork and a proactive approach to knowledge-sharing, process improvement, and operational efficiency, all of which contribute to the firm's overall growth and success.

Key Responsibilities:

Sales & Business Development:

- Participate with the owner in sales calls via Zoom, and take detailed notes.
- Draft engagement letters based on sales call discussions.
- Follow up on sales leads to maintain momentum and move prospects through the pipeline.
- Coordinate the onboarding process for new clients once engagement letters are signed.
- Oversee onboarding process to secure all client materials needed for a smooth handoff to accountants.
- Assist with marketing initiatives, including social media content and firm branding/theme projects.

**Client Services & Relationship Management:**

- Conduct client outreach to gather feedback and strengthen relationships.
- Provide proactive coaching to clients, teaching them how to save time and money using firm tools and processes.
- Register clients with State Department annual registrations and ensure compliance deadlines are met.
- Monitor scope creep on engagements and escalate issues for resolution.

Operations & Internal Support:

- Review tasks to identify team members who need assistance and reallocate resources when appropriate.
- Review time entries at month-end for accuracy and completeness.
- Follow up on client billing, credit card expirations, and outstanding balances.
- Serve as the firm's expert on company's tech stack, ensuring best practices are followed.
- Act as the primary point of contact with QuickBooks Online (QBO) for team support.
- Stay current on QBO updates and monitor ProAdvisor program status.
- Assist accounting team with annual audit preparation as needed.

Qualifications:

- Bachelor's degree in Business, Accounting, Marketing or related field preferred.
- 3+ years of experience in client services, account management, or sales support (professional service industry a plus)
- Strong written and verbal communication skills; confident in client-facing interactions
- Excellent organizational skills with the ability to manage multiple priorities.
- Skilled at figuring things out and solving problems. Confident in connecting systems, mapping data, and troubleshooting programs to keep processes running smoothly
- Proficient with Microsoft Office Suite
- Detail-oriented, resourceful, and proactive problem-solver

What We Offer to all Employees:

- 100% remote work
- Semi-flexible hours with a preference for availability during U.S. Eastern business hours
- A collaborative, supportive, and fun team culture
- Opportunities for growth and professional development
- Competitive compensation
- IRA with company matching
- Work Life Balance
- Paid continuing professional education



Full-Time Employees are eligible for:

- Paid Time Off
- Long-term Disability
- Firm plans to offer Health, Dental, and Vision in the near future