

Job Description

Title: Client Relationship Director

Directorate: Customer Experience

Responsible to: Senior Client Relationship Director

Location: Home-based with extensive travel and overnight stays as required

OVERALL PURPOSE

To manage and develop a portfolio of designated accounts by enabling the Member to utilise all Member benefits, demonstrating relevance and impact on the Member's business. To maximise retention and revenue through proactive and regular engagement with multiple contacts and the effective positioning of the Value Proposition and all its elements. To act as the Member's 'critical friend' and trusted adviser. To create, develop and monitor Members' customer service engagement plans and Return on investment statements based on a strong understanding of their business needs. To work collaboratively across The Institute to support the delivery of consistently excellent customer service.

KEY RESPONSIBILITIES

1. Membership development

- a) Manage a portfolio of accounts to ensure that they are supported in line with the Institute's membership strategy, business goals and values, and are focused on building strong long term relationships with Members.
- b) Maintain and develop Member relationships and manage accounts to achieve revenue, retention and customer satisfaction targets across the membership proposition, and to ensure Members are engaged and utilising the whole membership offering.
- c) Manage regular member interactions and engagement through a combination of face to face and virtual means to ensure a robust contact strategy is in place for all members.
- d) Work collaboratively across The Institute to deliver account management strategies and to support the achievement of our goals of sustainable growth, relevance and impact.
- e) Demonstrate the return on investment (ROI) of membership to the Member and their wider business, to ensure that The Institute remains relevant and creates the desired business impact within the Member organisation.
- f) As a 'critical friend', demonstrate and provide customer service knowledge, insight, practical support and access to wider resources, to help Members develop and implement their customer service strategies as part of their business plans and drive tangible business impact within their organisations.
- g) As the main conduit between the Member and The Institute, maintain overall ownership of the Member relationship at all times, to ensure that the benefits of membership are maximised and an active focus is maintained on improving customer service in the membership base.
- h) Work with the Business Development team to understand the profile of new or existing Members and ensure a smooth transition for the Member from acquisition to engagement.
- i) Carry out personal research and analysis in order to identify and demonstrate understanding of the prevailing commercial and customer service trends, issues and challenges relevant to Member organisations and their businesses / sectors.
- j) Gain and maintain a strong understanding of Member organisations' needs, commercial pressures, organisational priorities and competitive situation, to be able to demonstrate the value and relevance of our membership offering and its alignment with Members' aspirations.

- k) In conjunction with the Member organisation create a clear engagement plan and a recommended plan of action (including deliverables, timeline and route of travel) to create and/or deliver its customer service strategy, ensuring the whole membership offering and products and services is utilised and ROI of membership is clearly articulated.
- l) Provide accessible guidance and explanation of the purpose and value of our products and services (including research, insight, Academy and Insight Consultancy offerings and engage where appropriate), to ensure Members understand how the groupings of products and services interact, when and how they can be applied in a planned and integrated way within an implementation roadmap, and how they can support achievement of the Members' short and longer-term goals.
- m) Provide ongoing expert guidance and support to educate Members and their people in the availability and use of membership resources, tools and information, and to share awareness of good practice and relevant experience from other organisations.
- n) As agreed with the Senior Client Relationship Director, produce quarterly ROI value statements for all Members to provide clear ongoing evidence of the business benefits of membership and to promote understanding and take up of the whole membership offering.
- o) Support Members in creating and implementing qualifications programmes (including confirmation of sponsor, delegates and coaches) so that qualifications are positioned as a core element of a roadmap / action plan and in order to provide strong clear guidance on standards and responsibilities at an early stage.

2. Monitoring and review

- a) Work with Members and analyse data from the VLE system in order to monitor the progress of qualifications programmes on a quarterly basis and prompt remedial action as necessary.
- b) Analyse data and results from the Member's surveys (i.e. ServCheck, business benchmarking results, UKCSI) and support Members in interpreting and understanding their data, in order to measure performance, develop recommendations, prioritise actions and set further targets.
- c) Provide feedback, evidence and recommendations to the product team to help develop and amend current products and services and create new ones to meet Members' needs.

3. Engagement strategies

- a) Create and develop contact strategies for all accounts to establish and maintain multiple active contacts within accounts and to sustain high levels of advocacy and engagement with the Institute at all levels of Member organisations.
- b) Proactively drive the renewal planning process across the portfolio of accounts to ensure timely renewal that is based on a clear commitment to action within a meaningful business partnership and achieve retention targets.
- c) Carry out monthly forecasting of revenue and renewal plans and achievements against targets, to ensure anticipated and actual shortfalls are promptly identified and corrective action plans are put in place as agreed with the Senior Relationship Manager.
- d) Identify relevant senior contacts within the Member organisation, broker relationships with the Commercial Director and/or the Institute CEO and implement follow up actions, in order to deepen engagement with The Institute at all levels and elevate its profile.

4. Supporting service delivery

- a) Work in close partnership with the Communications, Product Portfolio and the Business Support teams to ensure clear allocation of responsibilities and ownership of delivery in servicing Members' day to day requirements.
- b) Work collaboratively across The Institute to identify, escalate and help resolve service delivery issues, and to ensure clear and agreed handover of activities to other teams is put in place for

specified activities or phases of delivery, whilst at all times maintaining ownership of the overall Member relationship.

- c) Proactively interrogate corporate systems / data to undertake forward planning and analysis of customer requirements and generate opportunities for further membership development and upselling of our products and services.
- d) Create and report appropriate and timely data in line with corporate requirements to deliver high quality management information for decision-making and planning purposes.
- e) Proactively create, share and document knowledge and experience to support learning and best practice across The Institute.

5. Communications and events

- a) In line with The Institute's core communications strategies and policies (including its digital strategy), work with the Communications and Corporate Affairs Directorate to proactively create and issue regular tailored communications to Members, to highlight the relevance of our work and the whole membership offering (including research, insight, the Academy and Insight Consultancy) and to link our activities with their own customer service goals and action plans.
- b) Work with the Communications and Corporate Affairs Directorate to identify opportunities for high quality case studies in order to raise The Institute's profile.
- c) Work with the Communications and Corporate Affairs Directorate to plan and organise local Member events and forums (real and virtual) that address customer service themes and topics that are of interest to Members and are also in line with our core communications strategy and events programme which is managed by the communications team.
- d) Provide on-site event hosting and support to ensure delivery to a high standard where participants are positively engaged and benefit from best practice and knowledge, and review attendee feedback to improve future offerings.
- e) Collaborate effectively with the Communications and Corporate Affairs Directorate in order to identify and develop appropriate Ambassadors within designated accounts and thereby extend our reach among Members.
- f) As agreed with the Senior Client Relationship Director or Commercial Director - Membership, speak on behalf of The Institute at Member conferences and where appropriate other member events in order to promote our work and the value of membership.
- g) Refer to the CEO's Office any speaking opportunities at industry-wide/sector events so as to maximise The Institute's wider profile and impact.

ROLE DIMENSIONS

Roles managed directly and indirectly: None

Financial responsibility / budget: None

Key relationships

Internal: Senior Client Relationship Directors; other Client Relationship Directors; Business Development Managers; Commercial Director; Research and Insight team; Communications Manager; Events Executive; Business Support Officers; Portfolio Manager; Portfolio Team; Academy Team; Standards and Quality team; Finance team; CEO's Office

External: Member organisations; partners; personal/business networks

Authority to act on behalf of the Institute: Represents The Institute to Members; hosts Member events and forums; authorised to speak at Member conferences on behalf of The Institute as agreed with the Senior Client Relationship Director or Commercial Director

SUCCESS CRITERIA

- Revenue targets are achieved

- Scorecard measures are achieved
- Membership retention is in line with renewal targets and desired membership profile
- Members see the Institute as relevant and creating a positive impact
- Membership growth is sustainable and maintains desired impact
- Customer satisfaction results
- CRM data is maintained and current
- Revenue / renewal forecasting data is consistently accurate
- Value Propositions are clearly demarcated and positioned in the marketplace
- The Institute is seen as a professional and business orientated organisation
- The Institute is clearly positioned as the expert on Customer Service
- CR Director is the first port of call on customer service issues for their Members
- The whole membership proposition is appropriately positioned and used
- Roadmaps / action plans are in place for all Members and maximise use of all our offerings
- Relevant and current engagement plan in place for all accounts
- Level of engagement is across multiple active contacts
- Effective collaboration across the Institute to deliver consistently excellent customer service

Candidates must be/have:

- Highly experienced in account management
- Brilliant individual & group stakeholder management skills at all levels and disciplines incl. - Director level and above.
- Deep knowledge of how businesses in a range of sectors operate and the ability to understand where our offering can assist their business
- Respected and admired by peers and colleagues and positive in outlook
- Highly Commercial and thrives on meeting and beating tough targets and closing the 'deal'
- Strong at building attractive, , profitable proposals to meet needs by positioning the membership offer and more broadly The Academy and Insight Consultancy. Able to articulate the big picture across the Institutes offering and position the purpose of the Institute.
- Brilliant at overcoming objections, independent and corporate with highly organised and proactive planning.
- Strong negotiation & influencing skills and speaks with authority so that others listen – both internally and externally.
- Hard working with pace and high energy
- A self starter
- Demonstrates a wide and strategic awareness of customer service best practice and trends
- Engages quickly with Members' strategic and long term business / customer service issues
- Proactively applies a range of relevant insight and research that is deeply understood
- High level facilitation and influencing skills with director/ senior management groups
- High levels of emotional intelligence (skilled in perceiving, understanding and managing emotions).
- Must have a clean drivers licence and access to a car

Core competencies

| Competencies | Level |
|--|--------------|
| 1. Delivers results | C |
| 2. Customer focused | D |
| 3. Teamworker | C |
| 4. Communicator | D |
| 5. Planner and organiser | C |
| 6. Analyses problems and makes decisions | C |
| 7. Perseveres to overcome obstacles | D |
| 8. Innovator/drives change | C |
| 9. Develops self and others | B |
| 10. Builds credibility and trust | D |

In return

We are offering a competitive salary with a host of benefits and a commitment to the personal development of all our employees.

This job description is not an exhaustive list of roles and responsibilities. There may be additional responsibilities added or removed in accordance with the needs of the business.