

# It all starts with you™

Careers with International Workplace

## Client Success Executive





# Making a difference

International Workplace is a learning solutions provider, established in Cambridge in 1995. We work in partnership with renowned employers in the UK and internationally, using our expertise in the discipline of workplace management to help them manage their people and places.

## About us

A leader in learning technologies, we deliver expert digital content that promotes and fosters learner engagement, providing employers with data, insight and analysis to track and improve individual and corporate performance.

Our award-winning work has been recognised for its innovation, the value it adds to clients, and its focus on the learner experience.

Trust lies at the heart of what we do. Our content is authoritative and credentialed: we are a licensed training centre for IOSH (health and safety) and ILM (leadership and management). Our systems are robust and reliable: we are accredited to the ISO 27001 Information Security Management standard, and all our solutions conform with data and privacy best practice.

Ultimately, we believe in the power of people – our own colleagues, and the people we work for – encapsulated in our strapline: *It all starts with you™*.

A Living Wage and Disability Confident Employer, we are also a signatory to the eLearning Manifesto – a recognised industry standard for good practice. Our innovative approach to eLearning has been recognised with a number of prestigious award nominations and we are committed to excellence in the design and delivery of our learning solutions.



## Do you have what it takes?

We have invested heavily in learning technologies and have ambitious plans to generate profitable new revenue streams from digital services in the UK and internationally.

Our expertise in delivering innovative digital services has won us accolades in recent years. We now need to monetise our investment to ensure our existing clients can benefit from our success, and to bring our products to a wider commercial market.

For this key role, we are looking for a Client Success Executive who will have the ability to build trust and manage effective peer-to-peer relationships with existing clients, to ensure that we are able to achieve a respected partnership approach. You'll need to really care about our valued clients, to understand their needs, and to help them appreciate how our products and services can help them successfully achieve their goals.

We want to achieve more awards success in 2019 – do you want to be part of the team that achieves that?



# Job description

**Job title:** Client Success Executive

## What we are looking for

We're looking for a Client Success Executive with excellent communication skills to act as a liaison between external customers and internal departments within International Workplace.

You will interact directly with learners, supervisors, managers and directors of a wide range of client organisations, including prestigious businesses and public sector organisations, both in the UK and internationally. You will play a vital role in managing the client relationship, with responsibility for solving problems, and ultimately aiming to provide excellent service to deliver long-term profitable solutions based on mutual trust.

You'll be responsible for securing sales revenue through repeat business from existing clients, and for developing client accounts, working with a Business Development Manager or Executive on key accounts, by identifying opportunities to expand and cross-sell International Workplace's products and services. You'll be targeted on client satisfaction rates, retention rates, sales revenue, and account growth.

You should possess outstanding sales and/or service experience, be a skilled communicator, and have a passion for learning and development, technology, new systems, and innovative business solutions.

**Role revenue target** £720,000 annually, £60k per calendar month, estimated £40k repeat business and £20k new business from existing clients

**Target client**

- Corporate businesses only
- The role will require the individual to establish and build relationships with L&D or H&S Directors (and equivalent roles)

**Sales cycle** Approximately 1-3 months

**Profile** This individual must be effective at working autonomously to build trusted relationships with valued current clients. GCSE (or equivalent) Maths and English level C or above are required, ideally education to degree level.

- You'll be commercially-aware, with an ability to balance client considerations with the demands of the business and to manage multiple and sometimes competing priorities.
- You'll be organised, with an ability to prioritise and good attention to detail, able to work methodically and meticulous in using our CRM system.
- You'll be flexible and up for the challenge – every client is different, and you never know what's coming next.
- You'll be an excellent communicator, able to bring ideas together from sometimes disparate sources and to manage and motivate all of the stakeholders involved in delivering excellent service to clients.



**Based at:** Westwick, Cambridge

**Reporting to:** Client Services Manager

**Salary:** Up to £25k basic per annum, plus £10k bonus (OTE £35k)

**Duration:** Permanent

**Hours:** 37.5 hours per week, 08:30-17:00 Mon-Fri with an hour for lunch.

**Benefits:** We offer an attractive benefits package that includes 24 days' holiday (which rises with service) plus eight bank holidays.

### Role functions

#### 1. Meet sales target and other Key Performance Indicators

- Including the weekly behavior targets outlined below

#### 2. Manage and develop existing accounts

- Working in partnership with the Client Services Manager and team members
- Expand relationships within existing accounts both through phone and face to face contact.
- Establish trusted advisor status with accounts
- Proactively identify, manage and convert new sales opportunities.

#### 3. Generate new business opportunities

- Identify key clients to develop as part of company sales strategy.
- Consistently be working on building new effective relationships both through phone and face to face contact.
- Maximize sales by cross-selling the company's product portfolio.

#### 4. As part of 1-3 this will require the person to:

- **Effectively build relationships** both with existing and new accounts through a combination of different prospecting activities including LinkedIn and attending relevant networking events.
- **Schedule and conduct meetings** with existing clients, conducted on the phone and in person.
- **Write high quality proposals.**
- **Give presentations and run demonstrations.**

#### 5. Conduct competitive research

- To understand key information about competitors to International Workplace which could include information on their products and services, how they are positioning themselves, their messages and pricing

#### 6. Working effectively with internal International Workplace teams including:

- Client Services Team
- Development Team



- Trainers and Consultants
- Finance Team

7. **Reporting and measuring their performance** based on company KPIs.
8. **Weekly sales pipeline and forecast** data produced in a timely manner.
9. **Weekly Sales report** prepared for close of business Friday and covering weekly results, wins, losses, learning and results of campaigns
10. **Travel to prospective clients**, on average 5 days pcm, throughout the UK.

### Behavioral expectations for managing and developing existing accounts

**Phone calls:** 15 new prospect conversations per week

**Meetings:** 10 face-to-face meetings per month

**Referrals:** 5 referrals per month

These numbers and activities may be revised over time.

### Aims and outputs

Aims	Outputs
<b>1. Client service and administration</b>	
<b>Administration</b>	
<ul style="list-style-type: none"><li>• Providing administration to support all company training and consultancy services, including liaison with awarding bodies, learners, client representatives, venue providers, and other parties</li><li>• Processing information accurately and efficiently using the company's CRM systems</li><li>• Supporting the Client Services Manager in all activities</li><li>• Providing support to Account Managers for key accounts</li></ul>	<ul style="list-style-type: none"><li>• Efficient and effective, error-free administration</li><li>• Compliance with company data privacy and information security policies</li></ul>
<b>Responsiveness</b>	
<ul style="list-style-type: none"><li>• Building relationships with existing clients by providing exceptional ongoing customer care</li><li>• Maintaining client relationships / day-to-day account management</li><li>• Responding promptly and professionally to client queries</li><li>• Problem-solving and escalating issues that require further resolution</li></ul>	<ul style="list-style-type: none"><li>• Achievement of <i>trusted advisor</i> status with client accounts through regular contact and understanding their business needs and objectives</li><li>• Consistent attainment of KPIs for client satisfaction and client retention</li></ul>
<b>Planning</b>	
<ul style="list-style-type: none"><li>• Planning account contact</li></ul>	<ul style="list-style-type: none"><li>• Up-to-date account contact plans</li></ul>



<ul style="list-style-type: none"> <li>Scheduling activities</li> </ul>	
<b>Reporting</b>	
<ul style="list-style-type: none"> <li>Reporting on activities and progress</li> <li>Attend regular meetings to update the Client Services Team on activity</li> </ul>	<ul style="list-style-type: none"> <li>Timely reporting on client contact activity</li> <li>Accurate and up-to-date reports, with accurate records of calls, meetings, decisions and next actions</li> </ul>
<b>2. Client sales administration</b>	
<ul style="list-style-type: none"> <li>Sales administration for all existing clients, including administering invoicing, credit control, deferrals and cancellations</li> <li>Administration of client contracts and agreements, including issuing, chasing up, and records storage and retention</li> <li>Providing sales administration support for Account Managers of key accounts where appropriate</li> </ul>	<ul style="list-style-type: none"> <li>Consistent attainment of KPIs for sales revenue</li> <li>Efficient and effective, error-free administration</li> <li>Compliance with company data privacy and information security policies</li> </ul>
<ul style="list-style-type: none"> <li>Actively engage with existing clients to ensure opportunities for repeat / renewal business are identified, booked and invoiced ('account farming')</li> </ul>	<ul style="list-style-type: none"> <li>Revenue generating opportunities are maximised</li> </ul>

<b>3. Client development</b>	
<ul style="list-style-type: none"> <li>Actively engage with existing clients to identify opportunities for profitable sales development and either progress them ('account development') or – where they are new accounts – pass them to NBD for development ('referral').</li> </ul>	<ul style="list-style-type: none"> <li>Consistent attainment of KPIs for referrals and portfolio account growth</li> </ul>
<ul style="list-style-type: none"> <li>Engage clients and the company's Development Team to assist with product development</li> </ul>	<ul style="list-style-type: none"> <li>Clients are actively engaged with product development activities</li> </ul>

## Person specification

Essential	Desirable
<b>Skills</b>	
<ul style="list-style-type: none"> <li>Effective at building relationships</li> <li>Effective questioning</li> <li>Good listener</li> <li>Effective oral and written communication</li> </ul>	<ul style="list-style-type: none"> <li>Decisive</li> <li>Assertive</li> <li>Influential</li> <li>Deals with conflict</li> <li>Attention to detail</li> <li>Creative problem solving</li> <li>Technologically proficient</li> </ul>
<b>Experience</b>	
<ul style="list-style-type: none"> <li>Experience in a service role</li> <li>Dealt with people at all levels</li> <li>Maintained and built relationships with senior decision-makers in existing accounts</li> </ul>	<ul style="list-style-type: none"> <li>Good understanding of technology solutions</li> <li>Has developed sales/account plans</li> <li>Experience in consultative selling, uncovering client needs and matching</li> </ul>



	<p>solution to their needs</p> <ul style="list-style-type: none"><li>• Experience of dealing with high profile corporate clients</li><li>• Expand existing accounts</li></ul>
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## Attitude

Essential	Desirable
<ul style="list-style-type: none"><li>• Ambitious and driven</li><li>• Takes personal responsibility for activities and results</li><li>• Peer to peer attitude with clients/senior decision makers in medium and large companies</li><li>• Solutions-minded: “every problem is an opportunity”</li></ul>	<ul style="list-style-type: none"><li>• Willingness to learn and continuous improvement</li><li>• Values accountability</li><li>• Strong work-ethic</li><li>• Responds well to change</li><li>• High ethical standards</li><li>• Team player</li><li>• Self-motivated, works well with minimal management</li><li>• High self-esteem</li><li>• Understands the importance of profit</li></ul>