

JOB DESCRIPTION

Position: Client Services Executive

Department: Membership

Band: Band 5

Hours: 35 hours per week (full-time)

Location: Tamworth

Reports to: Customer Relations Team Leader

Overview:

The Institute of Leadership & Management is a professional membership body, here to inspire great leadership, everywhere. We're proud of our long-standing heritage, but our passion to innovate and challenge the norm steers us to the future. Our commitment to delivering leading insight and world-class service to our members drives us forward, but all this is only possible thanks to our people and team spirit.

This brand-new role will see you providing the best client service experience and ensuring the team are supported fully. This role would suit a highly organised individual with experience of project or account management possibly gained within an agency or customer focused setting. The successful Client Services Executive will be joining the company at an exciting period of growth and will receive a great range of benefits.

Job Purpose:

- Actively support the Business Development team across the complete sales process.
- Concisely record and manage client requirements.
- Create and update data, information, documents and processes as required.
- Collaborate with other teams to ensure consistent client delivery.
- Build professional relationships with clients and other stakeholders.
- Work as a part of the Membership team supporting the day to day administration and service.
- Relating to our members and promoting our brand, values and ethics.

Responsibilities:

- Support the Business Development team as a first point of contact for inbound enquiries, pre-qualifying opportunities before progressing to the Business Development Manager (BDM).
- Work collaboratively with BDM to create and update data, information, documents and processes.
- Ensure data for the sales pipeline is maintained on CRM, reporting on outcomes and results.
- Proactively follow up leads generated through marketing campaigns, outbound call activities and other sales-generating activities and seeking opportunities for lead conversion.
- Build professional and trusted client relationships with new and existing corporate clients.
- Work as a part of the wider Membership team supporting the administration and service needs of our individual members and corporate clients.
- Answering incoming enquiries and queries via; telephone, email and post and providing a best in class service. Resolving issues promptly and escalating, where relevant.
- Support the retention and engagement with existing members by effectively managing the membership lifecycle from initial enquiry, on-boarding, upgrading and renewal.
- Managing the efficient processing of customer payments and renewals, including Direct Debit process and invoicing.
- Actively promotes the Institutes brand, values and ethics.
- Continually review and improve processes and procedures to support business requirements.
- On occasions work with the Business Development Team, attending or representing the Institute at trade shows, exhibitions and other events.

Key Skills & Experience:

- Customer centric – strong customer focus, experience of delivering great customer service both internally and externally.
- Previous experience of working in a sales and service role, ideally in a B2B environment (highly desirable).
- Ability to build professional relationships with a wide range of clients and stakeholders.
- Commercially astute - understands the end to end sales cycle.
- Excellent written and verbal communication skills – able to communicate at all levels and effectively pass on clear information to others.
- Able to work collaboratively and independently and work unsupervised.
- A strong team player and contributor.
- Experience of CRM (Microsoft 365 Dynamics highly desirable), digital products and good all-round IT skills are essential.
- Embraces change and consistently challenges the status quo.
- Strong organisational skills, able to plan and prioritise work to ensure deadlines and targets are met.
- Takes ownership and responsibility for personal actions / contribution and projects.
- Numerate and able to work with and interpret data and reports.
- Previous experience of financials, direct debit management and budgeting (desirable)
- Full UK/EU Drivers licence (desirable).