# HEAD OF CLIENT RELATIONSHIP MANAGEMENT

**(Trusted Advisory Network)**

## ABOUT US

The Institute of Customer Service is the UK's definitive Customer Service professional body. As the leading independent expert, we set and uphold customer service standards nationally to enable our customers to improve their business performance through service. We deliver tangible benefits to individuals, organisations and stakeholders so that our customers can improve their customer experience and their business performance. We currently have 400 members across multiple sectors.

Our role is more relevant than ever, as businesses recognise that customer experience is a critical element in business performance and a key driver of profit, productivity, trust and reputation. The pandemic has re-emphasised the fact that customers hold greater power and have higher expectations than ever before.

The Institute is a unique organisation with huge potential to make an even greater impact as the world of customer service continues to evolve. Your contribution will be key to ensuring we continue to adapt to the growing and changing needs of our Members and the external environment and maintain high levels of engagement and retention.

## IN RETURN

We offer a competitive salary and up to 30% on-target bonus plus a host of additional benefits, a supportive and stimulating work culture, and a commitment to your personal development.

## TRUSTED ADVISORY NETWORK MEMBERSHIP

Our Trusted Advisory Network category of membership is aimed at larger, national organisations who already have established customer service strategies. These accounts offer greater scope to extend our products and services across different business areas and functions to ensure that all areas of the Member organisation are delivering consistent standards of service and are aligned.

Working with their Client Relationship Director (CRD), the TAN Member agrees an engagement plan and timeline for deploying Institute products and services that will support their strategy, help them realise their business goals, and ultimately raise their customer service performance.
It is the CRD's role to act in a polished and professional 'consultative' style within this relationship, to understand what the member already has in place and clearly position how our membership offering complements and can support this.

With fewer accounts, there is more opportunity to work more closely with these complex accounts to understand their strategic direction, their structures, and their priorities. Networking effectively across the whole of the organisation is key, as the CRD identifies multiple contacts from multiple business areas / functions and works with the strategic decision makers and key influencers in each area to engage them in the whole membership offering.

There is also the opportunity to develop our members' thought leadership. At our quarterly TAN member meetings, TAN members can hear the latest thinking from The Institute direct from our CEO, learn from industry leading organisations, and network with other high-profile brands.

The Institute of Customer Service

**Job Description**

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| **Title:** | Head of Client Relationship Management (Trusted Advisory Network) |
| **Department:** | Customer Experience |
| **Responsible to:** | Commercial Director - Membership |
| **Location:** | Home-based with hybrid working<br>Regular travel with some overnight stays will be required |

**OVERALL PURPOSE**

Lead and develop a team of Trusted Advisory Network Client Relationship Directors and inspire them to deliver higher levels of membership engagement, resulting in sustained retention and growth within the membership. Help to deliver the overall purpose of The Institute and the yearly operational business plans to ensure that the performance of the Institute is achieved and sustained. Personally manage a small, designated portfolio of accounts. Embed the value propositions and role of 'critical friend' to ensure that The Institute is positioned as a 'must have', to demonstrate the ROI of membership, and to achieve membership retention and revenue targets. Ensure the relevance and impact of membership of The Institute. Build effective collaboration across the organisation to ensure integrated, consistent, and high-quality offerings are delivered in order to retain key accounts.

**KEY RESPONSIBLITIES**

1. Drive the culture and performance of the team to ensure member engagement increases and product penetration and retention is achieved.
2. Work as an effective and impactful senior team member to deliver the CED's business plan and objectives to ensure long term viability and success of the organisation in line with our vision, mission and overall purpose.
3. Lead the delivery and development of the overall account management/membership strategy and plan for the Trusted Advisory Network memberships.
4. Monitor and report to Commercial Director against plan financials and deliverables and escalate where required in a timely fashion.
5. Embed the value propositions to ensure achievement of revenue and retention targets across the membership proposition, so that Members are engaged and utilising the whole value proposition and Institute products and services.
6. Actively target and secure opportunities across the team for the Academy, Insight Consultancy, research and insight to support the achievement of the wider business targets, whilst also ensuring all standards and quality are upheld.
7. Manage a small 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.
8. Lead, inspire, manage and coach the performance and development of the team, so that the Trusted Advisory Network Client Relationship Directors are seen as 'critical friends' and experts in the field of customer service, taking prompt action to address shortfalls in performance, identifying development needs and arranging appropriate development activities, to enable the team to perform to the required standards.
9. Maintain high levels of performance, teamwork and collaborative working and build on previous team development activities to create and promote a conducive work environment.

10. Work collaboratively with fellow SLT colleagues across The Institute to lead the development and delivery of a culture change in the organisation that puts the customer at the heart of our business.
11. Drive up a higher level of commercial, competitor and business awareness to ensure colleagues understand the external environment and how the membership can deliver for them
12. Drive up member satisfaction in order to deliver a consistent member experience and improved retention.

**Relationship management: engagement and retention**

1. Ensure a robust and effective approach to territory management, engagement plans and ROI statements to drive broad engagement and proactive retention of accounts.
2. Act with integrity to ensure we maintain the Institute's profile and reputation.
3. Lead, support and monitor team performance to ensure we are positioned as 'a must have' to our members and members are appropriately engaged and the Institute is integrated and embedded within the organisation.
4. Lead and support the CRDs to deliver client loyalty and satisfaction and enhancement of the membership experience, and to demonstrate the ROI of membership to members.
5. Direct resources and skills to grow sustainable revenues from existing and new relationships.
6. Support and coach the CRDs to achieve targets and desired long term growth.

**Engagement strategies for all Trusted Advisory Network members**

1. Work with the team to ensure effective and up to date engagement strategies and documented plans are in place (including ROI statements) that deliver increased profitability and depth / breadth of engagement, minimise risk, and promote The Institute's brand and reputation.
2. Proactively manage the renewal planning process to ensure a clear commitment to action ahead of the renewal date and ensure retention targets are achieved.
3. Carry out monthly forecasting to ensure anticipated and actual shortfalls and at-risk accounts are promptly identified and corrective action plans are put in place in a timely manner.
4. Stay appraised and act on external and internal factors that impact the business and its services from a PEST, sector, regulatory and competitor perspective ensuring that offerings remain relevant and make a difference to our customers.
5. Key account management of a small portfolio of member accounts.

**Strategy**

1. Ensure that the CRDs have a full understanding of the business and commercial issues of the organisations they are managing, so that they are able to position our products and services appropriately to meet Members' needs at all levels within the member organisation.
2. Establish and maintain a commercial mindset throughout the account management team to ensure that members achieve appropriate ROI.
3. Demonstrate high levels of business understanding, commercial acumen and know-how and apply customer service expertise to address these issues and ensure members see the value and relevance of membership.
4. Set standards for and oversee the creation, implementation and audit of high-quality Member engagement plans, so that Members' needs are accurately reflected and engagement levels and multiple key contacts are adequately maintained in each account.
5. Achieve Customer Satisfaction Scores in line with Business Plan and drive for consistency and continuous improvement individually and collectively.
6. Work with the CEO to identify appropriate CEO contacts and potential Vice Presidents.
7. Undertake specific ad hoc project work as required by the Commercial Director.

**ROLE DIMENSIONS**

**Roles managed directly and indirectly:**
Direct: Trusted Advisory Network Client Relationship Directors
**Financial responsibility / budget:**
Delivery of financial targets as per business plans
**Key relationships -**
Internal: CEO; CFO; Directors; all Heads of Department across The Institute; Business Development Managers; Finance Manager; Product team; Marketing team; Research & Insight team.
External: Executive / senior management level individuals and teams in Member organisations across all sectors
**Authority to act on behalf of the Institute**
May speak on behalf of the Institute at membership events, conferences, etc. by agreement of the CEO

**SUCCESS CRITERIA**

- Revenue targets are achieved
- Scorecard measures are achieved
- Membership retention is in line with renewal targets and desired membership profile
- Membership growth is sustainable and maintains desired impact
- Customer satisfaction results are consistent across the team and improve year on year
- Employee engagement survey results demonstrate high levels of commitment and motivation
- Servcheck results are actioned
- CRM data is maintained and current
- The Institute is clearly positioned as the expert on Customer Service through self and the Client Relationship Directors
- The Institute is seen as a professional and business orientated organisation
- The whole team is motivated and engaged and meeting / exceeding targets
- CEO and Directors are fully up to speed with the external environment

**PERSONAL DEVELOPMENT**

It is your personal responsibility to ensure that your own professional knowledge and job skills are fully up to date at all times.

The manager is responsible for managing the performance and development of team members to achieve the business goals along with satisfying each member's own personal career aspirations.

The role holder is required to perform related duties as required. This profile does not necessarily include every responsibility, requirement or skill associated with the role. It is intended to reflect the role currently and the manager and role holder will revise the role profile as necessary to ensure the needs of the Institute and its customers can be met.

**PERSON SPECIFICATION: HEAD OF CLIENT RELATIONSHIP MANAGEMENT (TAN)**

**Knowledge**

- In-depth understanding of account management and retention strategies
- In-depth understanding of engagement planning standards and principles
- In depth understanding of current business issues and thinking
- In touch with competitive issues
- Strong understanding of how different businesses and business models operate
- Up to date knowledge of the key strategic drivers in organisations and business sectors
- Expert knowledge of customer service issues and priorities and how to apply these in organisation/member interactions
- Understanding of the role of technology and innovations in customer service
- PEST analysis
- Deep understanding of Institute offerings and how they can support a Member's strategic plans.
- Good up to date knowledge of our research and insight.

**Skills**

- Financially astute and highly numerate including presentation of data and MI
- Strong commercial acumen and business understanding
- Results-driven and bottom-line orientated
- Able to consistently make good decisions through a combination of analysis, wisdom, experience, and judgment
- A skilled people-manager, able to motivate and develop a diverse team and support them with timely and effective coaching and adapt style to meet the differing needs of team members
- Sets standards and pace for the team to drive a culture of improvement and high performance
- Strikes a good balance between working collaboratively, supporting the team / peers and holding others to account for their delivery.
- An impactful personal presence and inspiring presentation skills.
- Influencing skills rooted in personal gravitas and credibility with senior level people.
- Able to drive proactive and robust account planning and contact strategies.
- Consultancy-led approach to customer engagement.
- High level questioning, listening and diagnostic skills.
- Engages quickly with Members' strategic business and customer service issues.
- Skilled at applying commercial knowledge concisely and accurately to relevant customer issues
- Able to synthesise different elements of PEST analysis and research to demonstrate understanding of the environment in which the customer organisation is working.
- Able to demonstrate the ROI of customer service.
- Connects and communicates the whole Membership offer to meet Members' needs.
- Excellent stakeholder management skills at C suite level.
- Able to influence and challenge appropriately with authority and credibility.
- Able to negotiate and overcome objections using evidence-based arguments.
- Able to make and implement tough decisions
- Skilled in perceiving, understanding and managing own and others' emotions.
- Persuasive communication and influencing skills based on collaborative working across The Institute and with partner organisations.
- Able to build wide networks across a wide range of sectors.
- Technology capability: minimum intermediate level proficiency in Microsoft Word, PowerPoint and Excel applications; Zoom / Teams; CRM systems; learning platforms; presenting in a virtual environment.

**Attitudes**

- Lives The Institute's Values
- High integrity
- Proactive and solution-oriented
- Seeks best practice
- Proactive and solution-oriented
- Action oriented and energised by change
- Enjoys working across a diverse range of activities
- Innovative: generates and encourages new ideas
- Highly focused on the ROI of customer service
- Highly focused on delivery through deep customer understanding and engagement

**Strategic capabilities**

- Results focused: achievement-oriented with a strong focus on outcomes and tangible impact to drive the business forward.
- Working at pace: maintains momentum and drive to deliver timely results.
- Resilience and commitment to our purpose: has the psychological strength to adapt to change, cope with ambiguity, and overcome obstacles through perseverance, focusing on the purpose of The Institute to achieve the desired outcome.
- Agility / responsiveness: flexible and nimble in responding to changing needs and circumstances, both internal and external.
- Curiosity**:** motivated to learn more, has an open and enquiring mind, and asks skillful questions to surface new or dormant information.
- Critical thinking: engages in reflective and independent thinking and rational analysis and looks beyond the surface when evaluating information and making decisions.
- Creative thinking: thinks 'outside the box' and looks for sustainable solutions to our problems; poses 'why is that' questions and aim for continuous improvement.
- Collaboration: works effectively in partnership with others to achieve goals, including using collaborative technology.

**Experience**

- Significant account / sales management experience (typically minimum 7 years).
- B2B experience with focus on relational selling and long-term client engagement.
- Track record of consistently achieving/exceeding sales targets and delivering customer satisfaction.
- Building and developing relationships with executive / senior level clients.
- Demonstrable success in hiring, managing and retaining high performance account teams
- Operating strong engagement planning disciplines
- Has established strong professional and customer networks
- Proven success in implementing innovative ideas to enhance performance
- Experience in more than one business sector.

**Education and Qualifications**

- Degree level education or equivalent experience.
- Maths and English to minimum GCSE (1-5) standard or equivalent.
- Must have a clean driver's licence and access to a car.