Job Description

Title: Client Development Director – Discovery Roadmap

Directorate: Client Experience

Responsible to: Head of Client Relationship Management

Location: Home-based with regular UK travel; hybrid working

PURPOSE OF THE ROLE

This is a highly autonomous role working to deploy our Vision and Values and to sustainably grow our Membership by achieving financial targets. As the Member's 'critical friend' and trusted adviser, you will develop a network of key stakeholder relationships and deploy your commercial expertise and effective influencing skills. You'll provide relevant solutions by embedding our value propositions and tangibly demonstrate the ROI of Membership to the Member's bottom line.

KEY RESPONSIBILITIES

Relationship management

1. Support the achievement of The Institute's goals of sustainable growth, relevance, and impact by achieving personal targets and contributing to strategic growth plans.
2. Achieve renewal, revenue upgrades and product penetration targets and grow the territory in line with strategic goals.
3. Act as a 'critical friend' and trusted adviser to our Members, offering access to insight and expertise whilst constructively challenging the effectiveness of their customer strategies and ensuring use of our products and services.
4. Gain and maintain a strong understanding of Member organisations' needs to support alignment of Members' needs with The Institute's offerings.
5. Ensure Members and their activity plans are aligned and compatible with The Institute's Principles and Promises.
6. Carry out 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.
7. Demonstrate the return on investment (ROI) of Membership to ensure that The Institute remains relevant and achieves the desired business impact within the Member organisation.
8. Facilitate group discussions at C-Suite / senior manager level in order to drive impact and agree goals and actions.
9. Work collaboratively with colleagues across The Institute to deliver account management and the impact required for the Member.
10. 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.
11. Demonstrate and provide customer service knowledge, insight, practical support and access to wider resources, to help Members develop and implement their customer service strategies.

Engagement strategies

12. Ensure a robust sales process is followed and sales are appropriately and firmly closed.
13. Create, maintain and implement active and multi-layered contact strategies for all accounts to sustain high levels of advocacy and engagement and product penetration.
14. Work in collaboration with Members and Client Delivery Managers to create, manage and deliver robust, efficient and integrated engagement activity plans that Members are committed to driving forward through the lifetime of the Membership.
15. Work with the Client Delivery Managers to ensure annual ROI statements are provided so Members can clearly see the value of their Membership.
16. Apply an enquiring approach to forensically understand the Member's needs in order to provide robust and relevant solutions.
17. Proactively drive the renewal planning process to secure renewal revenue..
18. Analyse data and results from the Member's own surveys and support analysis in order to measure performance, develop recommendations, prioritise actions and set further targets.
19. Signpost access to Membership support services, tools and resources and appropriately upsell products and services to ensure Members utilise the whole Membership offering and maximise the benefits of their Membership.
20. Follow up and evaluate impact of training carried out in Member organisations so as to ensure return on investment and to identify further training opportunities.
21. 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 Head of Client Relationship Management.

Monitoring and review

22. In conjunction with the Head of Client Relationship Management, analyse Customer Satisfaction Survey feedback regarding account management support and implement action plans to address areas identified as requiring improvement.
23. Analyse data to create a deep understanding of Member needs and behaviours, create proactive plans, and provide accurate forecasts of sales and retention performance.
24. Provide feedback, evidence and recommendations to the Product team to help develop and amend current products and services..
25. Track and proactively report progress against personal targets and objectives, including but not limited to financial revenue performance, levels of product penetration and account renewals and territory planning.
26. Report real time data on pipeline, opportunities and forecasting for all lines of business.
27. Proactively monitor annual audits and support Members in preparing for interim surveys and assessments to ensure operation is within the Standards Framework and that the integrity of the product is maintained.

Institute communications and events

28. Proactively provide feedback and ideas to assist Marcomms in creating tailored Member communications and to link our activities with Members' service goals and action plans.
29. Work with Marcomms to produce high quality case studies in order to enhance The Institute's profile and credibility.
30. Work with Marcomms to plan and organise Member forums (real and virtual) that address customer service themes and topics in line with our overall event strategy.
31. Ensure regular Membership attendance at Discovery Roadmap meetings.

32. Work with Marcomms to identify opportunities for speaking engagements in order to enhance The Institute's profile and credibility. 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.
33. Work with the CEO office to identify appropriate contacts for C suite contact e.g. CEO breakfasts.

ROLE DIMENSIONS

Financial responsibility/budget
Delivery of financial targets as per business plans
Key relationships
Internal: CEO; CFO; Directors; all Heads of Department across the Institute; Client Delivery Managers; Business Development Managers; Finance Manager; Product team; Marketing team; Research & Insight team; Academy, Standards and Quality team
External: Senior managers, C 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

- Overall revenue targets are achieved
- Membership retention is in line with renewal targets and desired membership profile/tenure
- Membership growth targets are achieved
- Membership growth is sustainable and maintains desired impact
- CDD is the first port of call on customer service issues for their Members
- ROI of Membership is clearly demonstrated and acknowledged by Members
- The Institute is clearly positioned as the expert on Customer Service
- The whole Membership proposition is appropriately positioned and used
- Personal customer satisfaction results are achieved
- Customer satisfaction results are consistent and improve in line with Members' strategies
- Engagement is across multiple active contacts
- Product penetration levels are achieved and maintained
- Members see The Institute as relevant and creating a positive impact
- Valid and up to date engagement plans exist for all Members and maximise use of all our offerings
- Effective collaboration across the Institute to deliver consistently excellent customer service
- CRM and revenue / renewal forecasting data is consistently accurate and up to date

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.

PERSON SPECIFICATION – CLIENT DEVELOPMENT DIRECTOR (DR)

Knowledge
- A customer service expert who knows best practice, trends, and what 'great' looks like
- Commercially aware with a keen interest in the external business environment
- Comprehensive understanding of how different business models operate in a range of sectors
- Understands evolving business models (e.g. start-ups, tech businesses)
- Understanding of the Institute's business and financing models
- Deep understanding of our Value Propositions, products and services
- Sales processes: how to spot, develop and close opportunities
- Clear and current understanding of the business context and challenges for Members
- Deep understanding of how the whole offering fits with a Member's goals and challenges
- Understanding of our Standards and how they work in practice
- Awareness of what makes for sustainable business including tenure / type of Membership
- Understanding of budgeting cycles and procurement requirements
- Stakeholder management tools and principles

Skills
- Able to consistently achieve targets across a range of key metrics
- Skillfully brings together a range of knowledge, experience and data to tell relevant stories and create a desire for action and change
- Able to recognise and develop sales opportunities and deploy effective closing skills
- Strong at building attractive, sometimes complex, profitable proposals to meet Member needs by positioning the whole Membership offer and the purpose of The Institute.
- Able to engage quickly with Members' strategic and long term business / customer service issues
- Skilled at applying commercial knowledge concisely and accurately to relevant customer issues
- Demonstrates a wide and strategic awareness of customer service best practice and trends with clear external referencing
- How to use PESTLE and SWOT analysis to create meaningful and actionable insight
- Agility to adapt thinking and approach as Members' priorities / environment (and ours) change
- Able to demonstrate relevant ROI that is connected to the Member's goals and describe tangible impact in concise and precise business language
- Able to research and synthesise relevant external information and trends efficiently
- Able to spot opportunities to sell in additional products / services (including L&D and R&I) to create 'stickiness' of our offerings
- Able to write convincingly using commercial language
- Able to maintain commitment to our purpose and alignment of Members to our Standards and Values in the face of challenges
- Strong negotiation and influencing skills
- Gravitas, impact, credibility and influence at C suite / senior management levels: speaks with authority so that others listen – both internally and externally
- Strong individual and group stakeholder management skills at all levels and disciplines
- Skilled and robust consultative questioning and fact finding techniques to go below the surface
- Active listening and accurate reflection / feedback techniques
- Demonstrates genuine curiosity, empathy and interest in the organisation, its people, their concerns and goals
- Emotional intelligence: perceiving, understanding and managing own and others' emotions
- Effective at overcoming objections, challenges constructively and uses evidence-based arguments

- Able to deploy robust account management techniques in territory management, engagement planning, layered contact strategies, stakeholder mapping, etc.
- Analytical and interpretative ability for accurate data analysis / manipulation, forecasting, etc.
- Able to present and explain numerical data and qualitative content clearly and concisely to a professional standard using appropriate tools
- Highly organised and can operate autonomously
- Applies good judgment in determining virtual and in-person interactions and managing the hybrid balance appropriately
- Technology competence: MS Word, Excel and PowerPoint to minimum intermediate standard; Office 365; CRM systems; learning platforms; ICS website; Membership platform; Intranet; presenting in a virtual environment (Zoom / Teams)

Attitudes

- Maintains pace of delivery and action-orientation
- Resilient and embraces change
- Thrives on meeting and beating tough targets and closing the deal
- Self-belief in their role and authority as the Member's trusted adviser and critical friend
- Prepared to initiate challenging conversations
- Highly self-motivated but still a team player
- High energy and hardworking
- Lives The Institute's values
- High integrity
- Proactive and solution-oriented

Experience and Qualifications

- Track record of high achievement and meeting both quantitative and qualitative targets.
- Significant account management experience (typically minimum 5 years) with exposure to senior level teams.
- Experience in relational selling and long-term client engagement.
- Experience in more than one business sector.
- Technology proficiency across relevant systems.
- Customer service experience is an advantage.
- Maths and English to minimum GCSE (1-5) standard or equivalent.
- Degree level education or equivalent experience.
- Sales / account management qualifications an advantage (e.g. SPIN)
- Must be prepared to travel on business and to London office.
- Clean driver's licence and access to a car.

The role holder is required to perform related duties as required. This job description 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 job description as necessary to ensure the needs of The Institute and its customers can be met.