

Job Description

Title:	Client Delivery Manager
Directorate:	Client Experience
Responsible to:	Head of Client Relationship Management
Location:	Home-based with UK-wide coverage Hybrid working: typically 80% remote and 20% in-person

PURPOSE OF THE ROLE

To support Members by driving and enabling implementation of their Engagement Plans, promoting the use of the full range of Member benefits / offerings, removing internal blockers, and working closely with Client Development Directors and key stakeholders both externally and within The Institute. To support the delivery of consistently excellent customer service in line with our Values and our Standards framework. To support the achievement of our financial targets and our goals of sustainable growth, relevance, and impact.

KEY RESPONSIBILITIES

Engagement planning and support

1. Work in close partnership with the Client Development Directors (CDDs) and other Client Delivery Managers to ensure clear allocation of responsibilities and ownership of delivery in servicing Members' operational requirements.
2. Provide exceptional end-to-end service support, drive continual service improvement, and ensure we deliver to our Values and Standards.
3. Work closely with CDDs and Members to monitor and support the creation of meaningful Member engagement plans that drive active Member participation and take up of products and services within realistic timescales and in line with commercial targets.
4. Agree, document, and monitor detailed implementation actions in conjunction with CDDs and colleagues across the business to ensure key milestones, risks and dependencies are captured and understood and that systems, procedures, and methodologies are in place to support excellent service delivery.
5. Deploy effective ongoing project management to identify risks, dependencies and mitigation and to implement corrective or mitigating actions in consultation with the relevant CDD.
6. Manage and report on the detailed implementation of agreed engagement plans to help ensure deadlines, quality, CSAT, and revenue outcomes are achieved, the whole membership offering is utilised, and ROI is clearly articulated.
7. Establish and maintain effective relationships with relevant Member contacts and stakeholders (typically managers in customer service, marketing, operations, and training) and drive for active commitment and delivery by the Member in order to achieve their plan and maximise the benefits of membership.
8. Monitor engagement plan activities and promptly highlight to CDDs instances of low activity by Members or over-servicing by The Institute so that corrective action can be taken.
9. Proactively monitor and drive renewal planning (including accreditation renewals) across the portfolio to support achievement of retention targets through clear commitment to action within a meaningful business partnership.

10. Proactively interrogate corporate systems / data, apply knowledge of Members and relevant external factors, and undertake analysis of customer requirements, in order to propose further engagement opportunities with existing Members to CDDs and to suggest to BDMs potential new business opportunities that are consistent with the wider business plan.
11. Work with the CDD to actively engage Members and maximise attendance at all Member events and forums (real and virtual) and implement appropriate follow up actions to maintain engagement and momentum.
12. As agreed with the CDD, attend Member meetings / service reviews and provide information and support to resolve queries and drive joint planning and action.
13. Run reports and provide data analysis for the CDD and Head of Client Relationship Management in line with team requirements and standards.

Service delivery

14. Work proactively and collaboratively across The Institute and with external partners to identify, escalate and help resolve service delivery issues, maintain effective co-operation and communication, share knowledge and escalate issues appropriately.
15. Establish and maintain clear lines of communication and consultation to ensure clear and agreed handover of activities to other teams for specified activities or phases of delivery, whilst at all times maintaining ownership of overall delivery of the Member's programme.
16. Collaborate with colleagues across the business and relevant external partners to explore Members' product, process or systems queries / issues and to provide prompt and robust resolutions.
17. Support the Customer Experience team to resolve complex or recurring queries and to ensure relevant SLAs are achieved.
18. Seek and propose evidence-based opportunities for process and cost efficiencies to help improve service quality and customer satisfaction and to increase value for money for The Institute.
19. Provide evidence-based input to the Product team to support product evaluation, improvement and development that meets Member needs and remains in line with the business plan, our Values and our Standards framework.
20. Set up, monitor and support the running of Members' surveys to ensure maximum participation and achievement of timelines, resolving log-in and process / data issues as necessary.
21. Support generation and interpretation of survey data reports to ensure CDDs have all relevant information with which to prepare timely presentations and feedback for Members.
22. Analyse data and results from Member surveys and support Members in interpreting and understanding their data, in order to measure performance, develop recommendations, prioritise actions and set further targets.
23. 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.
24. Support Members in setting up and implementing Qualifications programmes 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.
25. Actively monitor the progress of Qualifications programmes on a quarterly basis and prompt remedial action with Members as necessary to ensure programme fulfilment.
26. Administer supporting processes to ensure invoicing, purchase orders, Academy referrals and other related documentation are handled efficiently and completed to time and quality standards.

27. Maintain accurate and up to date records in CRM and other relevant systems in line with business standards to generate meaningful data for self and CDDs and support management decision-making.
28. Proactively create, share and document knowledge and experience to support learning and best practice across The Institute.
29. Work closely with CDDs, Customer Experience, and the CEO's Office to support investigation and resolution of Members' complaints, providing data and background information as required.
30. Work with the Marcomms team to identify opportunities for high quality case studies in order to raise The Institute's profile.

Advice and guidance

31. Provide accessible guidance and explanation of the purpose and value of our products and services 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.
32. Provide ongoing expert guidance and support to position, explain, and promote take-up of membership resources, tools and information, to resolve Member queries quickly and accurately, and to share awareness of good practice and relevant experience from other organisations.

ROLE DIMENSIONS

Roles managed directly and indirectly: None

Financial responsibility / budget: None

Key relationships

Internal: Heads of CRM; Client Development Directors; other Client Delivery Managers; Business Development Managers; Commercial Director - Membership; Research and Insight team; Marketing and Communications Manager; Events Executive; Business Support Officers; Product team; Academy, Standards and Quality team; Finance team; CEO's Office

External: Member organisations; suppliers / partners; personal/business networks

Authority to act on behalf of the Institute: None

SUCCESS CRITERIA

- Overall revenue targets are achieved
- Membership retention and renewal is in line with targets and desired membership profile
- Customer satisfaction results
- Active and up to date engagement plan in place for all accounts
- Members' action plans and engagement plans are delivered as expected
- Risks are identified and appropriately managed / mitigated
- CRM and other business data is maintained and current
- Regular reporting and subsequent action taken
- Product penetration levels are achieved and maintained
- Take up of products and services by Members
- Members see the Institute as relevant and creating a positive impact
- Membership growth is sustainable and maintains desired impact
- The whole membership proposition is appropriately positioned and used
- Revenue / renewal forecasting data provided to CDDs is consistently accurate
- The Institute is seen as a professional and business orientated organisation
- The Institute is clearly positioned as the expert on Customer Service
- Effective collaboration across The Institute to deliver consistently excellent customer service

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 DELIVERY MANAGER

Knowledge

- Demonstrates a broad awareness of business issues and trends and the importance of service as part of this
- Solid product and service knowledge including our Research and Insight and Academy offerings
- Deep knowledge of how businesses in a range of sectors operate and the ability to understand where our offering can assist their business
- Robust understanding of our Standards framework
- Project management / planning techniques including risk

Skills

- Ambassadorial skills - instils confidence and trust internally and externally
- Builds relationships with stakeholders / key contacts quickly and maintains them effectively
- Able to communicate all product and service features, benefits and updates effectively
- Strong planning, organising, and prioritisation skills
- Applies effective project management skills and techniques
- Applies appropriate judgment in identifying and addressing risks and issues
- Manages conflict by creating a solutions focus and negotiating positive outcomes
- Strong eye for attention to detail and adherence to process and standards
- A completer-finisher who is focused on achieving outcomes and deadlines
- Effective influencing skills focused on cooperation and joint action to achieve goals
- Able to facilitate and support meetings (in-person and virtual) with a focus on action and accountability
- Able to coordinate / run webinars and events
- Numerate, able to analyse multiple data sets, identify trends and use data to support recommendations
- Technology competence: Microsoft suite especially PowerPoint and Excel at intermediate level or above; fluent use of CRM including data input, audit and reporting; fluent use of VLE

Attitudes

- Thrives on delivering to meet goals and deadlines
- Enjoys overcoming obstacles
- Resilient and embraces change
- High energy and hardworking
- Lives The Institute's values
- High integrity
- Proactive and solution-oriented

Experience and Qualifications

- A solid background in Customer Service Management, Account Management or Service Delivery Management (typically a minimum of 3 years)
- Account management / service delivery experience working with a range of external contacts
- Track record of consistently high achievement in their field
- Experience of running stakeholder / supplier meetings
- Degree or equivalent level educational attainment

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.