JOB DESCRIPTION

Position: Client Account Executive

Department: Client Services

Band: 5

Hours: 35 hours per week (full-time)

Location: Homebased (with travel to attend meetings/ events as required)

Reports to: Senior Account Manager

Overview:

We're a global community of managers, passionate about the difference that leadership makes to people's lives.

For over 70 years, we've been supporting people to develop great leadership practice.

Our experience keeps us grounded: Our ambition drives us to inspire great leadership, everywhere.

Job Purpose:

The Client Account Executive is the key point of contact for our existing corporate clients throughout their lifecycle, including identifying and progressing further sales opportunities. Part of the role includes support to our wider Membership Team with meeting the needs of our membership base during busy times and absence.

Responsibilities:

- Support the business development team as a first point of contact for inbound enquiries, accurately recording client requirements and additional opportunities before progressing to the Commercial Team.
- Work collaboratively with business development team to create and update data, information, documents and processes on the CRM system and other systems.
- Build ongoing professional and trusted client relationships with new and existing corporate clients to include identification and progression of further opportunities.
- Effectively manage the post-sale administration process for our products and membership/engagement lifecycle. This includes the creation, distribution and receipt of completed contracts, registering learners, on-boarding and supporting new clients and learners, processing upgrades, renewals and creating and distributing certificates.
- Where relevant conduct online/virtual product demonstrations to new and existing 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 and email providing a best-in - class service utilising online/virtual medium where relevant. Resolving issues promptly and escalating,

where relevant.
- Gathering customer feedback and communicating to relevant departments to improve the customer experience.
- Accurate and timely processing of customer payments and renewals, including Direct Debit process and invoicing and supporting the finance team with account queries.
- Maintain and contribute to the development of account management procedures.
- Actively promotes the Institutes brand, values and ethics.
- Continually review and improve processes and procedures to support business requirements.
- On occasions work with the wider team, attending or representing the Institute at trade shows, exhibitions and other events.
- Any other duties as may be required by your manager for the successful performance of your role.

Key Skills & Experience:

Essential

- Excellent customer service skills, delivering a great service to our internal and external customers.
- Professional, approachable and highly organised with strong administration skills and excellent attention to detail.
- Able to plan and prioritise work to ensure deadlines and targets are met.
- Previous experience of working in a customer service or support role providing ongoing account management.
- Ability to build professional relationships with multiple stakeholders.
- Excellent written, verbal communication and presentation skills – able to communicate at all levels and effectively pass on clear information to others.
- Being able to move between collaborative and independent working, taking ownership of the role and contribution to the business.
- Working experience of CRM systems, other digital products such as Microsoft Teams and Zoom and Microsoft Office 365.
- Quick and accurate data entry skills.
- Ability to prioritise and manage time effectively to ensure deadlines and objectives are met.
- Adaptable and embraces change in an evolving environment.
- Numerate and able to work with and interpret data and reports to support the commercial team in the client lifecycle and engagement.
- Ability to work flexibly and adapt to the needs of a small team and growing business.
- Willingness to travel to attend meetings and events as required.

Desirable
- Experience with Microsoft Dynamics, Microsoft Excel, Sharepoint and Adobe.
- Commercially astute - understands the end-to-end sales cycle.
- Experience in invoicing, direct debit transactions and online payments.
- Previous experience from educational background delivering online learning.
- Previous experience working in a B2B or not-for-profit environment.
- Full UK Drivers License.