

Role Profile: Customer Success Support**Team:** Customer Experience**Reporting to:** Customer Success Manager**Job Level:** Level 4**Purpose...**

To provide excellent customer service to a range of clients by building successful relationships and understanding key client requirements. Responsible for ensuring that services are delivered in line with HF standards and client contractual agreements.

Key Accountabilities...**New Business Development/Set Up**

- Support the implementation of new work within existing contracts.
- Recognise additional service or delivery requirements and highlight these as potential business opportunities to the Customer Success Manager/Sales Owner.
- Talk to existing clients about Hemsley Fraser's core services and products sharing examples of success stories where applicable.

Working with Clients

- Schedule events and manage logistics with clients and trainers, ensuring the accurate capture of information on databases/spreadsheets and ensuring the process delivers a quality experience to the client.
- Proactively manage the timescales for holding dates and availability ensuring that client, trainer and business needs are met.
- Receive incoming requests for information and respond/process accordingly to ensure accurate and timely information is given to clients and trainers.
- Review event evaluations and take appropriate action to address issues raised in order to continuously improve our service to clients.
- Have a thorough knowledge and understanding of, and proactively adhere to, client requirements, SLAs and KPIs.
- Have a good knowledge and understanding of the requirements of your clients and the contract agreements in place.
- Own and develop successful client relationships, acting as the first point of reference for assigned client stakeholders.
- Manage contract risks and issues logs proactively and support sharing of lessons learned across the Customer Experience Department and wider business.

- Project manage small projects and provide administrative support for larger projects or project work for new business or pre-sales work.
- Produce standard reports in a timely manner to ensure quality standards are met and proactively analyse reports for trends where appropriate.
- Produce accurate and timely monthly management information and/or invoices as required.
- Support or lead internal contract calls and client calls and contribute to contract review meetings.
- Sign off supplier/trainer invoices, ensuring accurate claims have been made in line with agreed policies, KPIs, project scope documents and change requests and that any concerns are escalated to the Customer Success Manager/Project Manager or Finance team to ensure consistent cash flow.
- Record and monitor revenue, ensuring effective cost control and recovery against pre-agreed margins and flagging any significant changes to the Customer Success Manager/Project Manager.

Hub Management

- Hub administration for client owned hubs - creating playlists, adding users and sharing content.
- First line support for client hub enquiries/support.
- Produce and review standard hub reports and provide a summary of what insights the data provides.

Virtual Deliveries

- Have a working knowledge of the platforms that Hemsley Fraser uses to deliver virtually and the operational processes associated with each platform.
- When workload allows, fulfil the role of producer on virtual deliveries.
- Own the scheduling of VILTS where a client has purchased their own platform license, ensure that rooms and links are set up correctly and shared with both clients and the HF faculty.

Operational Excellence

- Be able to cover other areas/disciplines on a regular basis as well as being a designated back up for other contracts.
- Regularly review contract user guides, ensuring regular updates are made to guarantee accuracy of information and ease of use.
- Share best practice and interrogate existing processes, identifying areas/scope for improvement and discussing the benefits of implementation with the team/inter-departmental teams, implementing or escalating as appropriate.
- Provide inductions for new starters to the business.

Knowledge & Skills...

- Good standard of verbal and written English (minimum GCSE to 'C' and above or equivalent)
- Competent with MS Office, including Microsoft Excel
- Attention to detail and accurate data entry
- Excellent business communication skills (verbal and written)
- Experience in a business-to-business client focused environment
- Able to engage effectively with employees, clients and suppliers at all levels
- Ability to actively display a positive attitude to change and business improvement
- Experience of supervising and mentoring individuals and teams
- Ability to demonstrate commercial awareness on a day-to-day basis

Competencies...

- Client-orientated.
- Working together.
- Planning and organising.
- Problem solving.
- Drive.
- Integrity.
- Business communication skills.

Measures of Performance...

- Managing deadlines.
- Internal, client & trainer feedback.
- Standard of individual output (quality).
- Own and team's compliance to SLAs/KPIs.
- Accuracy of reporting and tracking.
- Positive behaviour and approach.
- Adherence to Hemsley Fraser Values.