

# Job Profile

## Membership & Sales Co-ordinator

Department	Client Manager
Location	Solihull
Reports to	Project & Bid Manager
Hours	Nominally 37 hours but operationally available at all times to meet Company requirements.
Contract	Permanent
Constraints (travel/ base/ working patterns etc)	Co-located between the office in Solihull and Home
Salary	£24,000 per annum plus eligibility for company bonus scheme plus pension and employee benefits
Date	August 2021

### About us

Everyday over 65 million people in the UK rely on the energy and utilities sector to provide services that are essential to the health, safety and prosperity of every person and business in the UK.

Energy & Utility Skills are at the forefront of bringing our industry leaders together to identify and address the skills challenges our sector faces. We provide membership, assurance and skills solutions to help employers attract, develop and maintain a sustained skilled workforce to safeguard the future health, safety and prosperity of every person and business in the UK.

### About the role

This is an excellent opportunity to support the growth of our services through co-ordinating our sales activities. You will work with the Client Managers and Head of Strategic Accounts to support the go-to-market activity that enables the team to maximise sales opportunities.

You will be responsible for the coordination of sales reporting and the collation of *Return on Expectation* (RoE) data that supports future sales. You will also provide administration support to Client Managers facilitating Network Group meetings.

You will collaborate across the business to enable efficient and effective reporting that supports the business to plan effectively based on predicted future business growth. You will be a CRM system specialist, capable of maximising the system capability to build a valuable tool for the business that supports all external communications, relationships and opportunities for growth.

### About you

You will be a data-driven individual, and comfortable dealing with a broad range of data sets, identifying useable and actionable insights to support the sales process and improve productivity of the client management team.

You will have extensive system administration experience with CRM systems and be able to create reports quickly and accurately. You will have strong Microsoft Office and reporting skills and be a self-motivated team player.

To be successful in this role, you will need to be self-motivated with a range of business administration skills and experience of working in a fast-paced commercial environment to coordinate new member on-boarding and provide high quality meeting and event support.

You will need excellent organisational skills with the ability to develop effective working relationships with clients, customers and colleagues at all levels.

Naturally, you will be experienced in managing customer enquiries and ensuring a great customer experience. An understanding of the energy and utility sector is advantageous.

### Key Responsibilities:

#### Management of Sales & CRM reporting:

- Maintain and manage processes to ensure data quality in CRM, identifying opportunities to make improvements to data quality.
- Generate bespoke data reports from CRM to meet colleague needs including distribution lists for marketing campaigns and sales pipeline reports
- Manage ongoing continuous improvements to the CRM system, based on colleague feedback and updates to business process (including dashboards, reports, workflows or fields Deliver CRM induction training to meet the individual needs of new colleagues, acting as subject matter expert for all CRM queries.
- Collate and analyse sales and membership data to create bespoke charts and dashboards that keep colleagues up to date and support business decision making
- Prepare monthly membership and sales pipeline reports for SLT; generate data reports from CRM, working with client managers to understand data, interpret and analyse results. Present data to the business to inform decision making
- Support the development of sales targets, working with the Head of Strategic Accounts and Finance Team
- Work with the Client Managers to identify areas of focus and subsequent actions to increase sales
- Work with internal stakeholders to track service line sales performance against annual and quarterly targets (membership, end-point assessment and registrations as detailed below)

**Tracking sales and income**

- Work with the end point assessment (EPA) team to ensure that the operational tracker is aligned with pipeline reporting to provide accurate reporting to the business at monthly Senior Leadership Team meetings
- Support the Senior Client Manager in the development of the EPA Sales Plan, including income forecast planning, competitor analysis and researching new /potential clients
- Track run rate performance against targets, working closely with the Registration Services team and regularly updating the Head of Strategic Accounts
- Support the Senior Client Manager in the development of the Registrations sales plan, including income forecast planning, competitor analysis and researching new/potential clients

**Membership co-ordination**

- Manage the application, invoicing, and welcome process for new and renewing members
- Support operational delivery of Membership by working with Client Managers to coordinate and facilitate Network Groups, preparing agenda's, taking meeting minutes, and following up on actions
- Engage with colleagues from across the business to collate and present weekly ROE data for the Head of Strategic Accounts
- Support the Senior Client Manager in the development of the annual Membership Sales Plan including income forecast planning, competitor analysis and researching new/potential clients

**Other**

- Support the Project & Bid Manager to coordinate the Professional Associate Database process including selection process, application process, drafting new contracts, seeking feedback and securing sign off
- Ensure compliance with Energy & Utility Skills data protection policies and processes
- Take reasonable care of your own health and safety and that of others in the workplace

**Key measures for success**

- Timely delivery of the annual sales plans
- Effective internal stakeholder management regarding all sales activity
- High quality (complete), and up to date CRM as judged by the Head of Strategic Accounts
- Administration of Member renewal process within agreed time frames
- Timely and accurate pipeline, membership and CRM reporting to meet the needs of the Head of Strategic Accounts/SLT
- Effective management of the Professional Associate Database by ensuring processes and Associate records remain up to date

## Person Specification

	Essential	Desirable
<b>Education</b>		
5 GCSE's (including English and Maths) or equivalent	✓	
NVQ Level 3 or 4 in Customer Services or ICS Professional Award		✓
Degree in Business Administration or similar, or working at degree level		✓
<b>Work Experience</b>		
Demonstratable experience of using a Customer Relationship Management (CRM) system	✓	
Experience of working in a fast paced service delivery team within a commercial environment	✓	
Experience of working within a sales environment or supporting sales activities	✓	
Business administration experience including data collation, reporting and analysis and meeting minutes	✓	
Demonstrable experience of working with financial reporting		✓
Understanding of the energy and utilities sector		✓
<b>Skills &amp; Competencies</b>		
Knowledge of and ability to use Microsoft Office, particularly Word, Excel and Outlook at an intermediate level.	✓	
<b>Planning &amp; Organising</b> Plans activities and projects well in advance; manages time effectively; monitors performance against deadlines and milestones, used to working a fast-paced environment	✓	
<b>Analysing</b> Analyses numerical and written data and all other sources of information; breaks information into component parts, probes for further information and makes rational judgements from the available information and analysis.	✓	
<b>Relating &amp; Networking</b> Establishes good relationships with customers and colleagues; relates well to people at all levels	✓	
<b>Writing &amp; Reporting</b> Writes clearly, succinctly and correctly; in an engaging and expressive manner; writes in a well structured and logical way; structures information to meet the needs and understanding of the intended audience; high attention to accuracy and detail	✓	
<b>Decision Making &amp; Taking Action</b> Makes prompt, clear decisions; takes responsibility for actions and projects; takes initiative, acts with confidence and works under own direction; initiates and generates activity.		✓

## Values & Behaviours

### Together

We are stronger together, collaborating to deliver success

- Supporting and empowering each other
- Working as a team to deliver the best for our clients, customers and colleagues
- Being respectful, responsive and reliable
- Keeping all communication clear and constructive
- Understanding and valuing how we all contribute to our success

### Being Credible

A trusted voice providing thought leadership to the sector

- Providing expertise, openly sharing insights and best practice
- Taking a proactive approach to understanding the sector and the key issues affecting our members
- Delivering on time and keeping promises
- Ensuring work is of the highest standard and delivering exceptional customer service internally and externally.
- Taking ownership of personal development

### Making a Positive Difference

We do the right thing and make Energy & Utility Skills a great place to work

- Inspiring others by going the extra mile
- Bringing energy, passion and a positive approach to work, every day
- Celebrating success and taking pride in everything we do
- Embracing change and identifying opportunities to make a difference
- Leading by example