

Job Profile

Sales Coordinator

Department	Client Management
Location	Solihull
Reports to	Project & Bid Manager
Hours	37 hours per week (full-time)
Contract	Permanent
Constraints (travel/ base/ working patterns etc)	Co-located office two days a week and home based 3 days a week.
Salary	£28,000 per annum plus eligibility for company bonus scheme, pension and benefits
Date	February 2022

About the role

This is an excellent opportunity to support the growth of our services through the coordination of all our sales reporting. This reporting helps the business to plan effectively, based on predicted sales pipeline. You will work closely with the Director of Strategic Accounts and Client Managers to support our go-to-market and sales activities.

You will provide proactive and efficient support to the sales team in varying aspects of the sales process and the delivery of membership services including setting up sales calls, supporting customer meetings and coordinating the onboarding of new customers.

You will collaborate across the business to collate data which helps us measure the value and benefits of our membership services to our customers.

About you

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About us

Everyday over 67 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 for a greener world. We provide membership, assurance and skills solutions to deliver a safe, skilled and sustainable workforce with energy and utility industries.

Key Responsibilities:

The Sales Coordinator will be responsible for:

Coordination of pipeline and sales reporting

- Collate and analyse pipeline and sales data to create bespoke charts, dashboards and reports that keep colleagues up to date on progress against targets and support business decision making.
- Work with colleagues to track sales performance against annual and quarterly targets for sales managers or products/services.
- Work with the Client Managers to identify areas of focus and actions to increase sales.
- Support the Director of Strategic Accounts and Senior Client Managers in the development of sales plans, including income forecast planning, competitor analysis and researching new /potential customers.
- Work with colleagues in Operations teams to ensure their operational plans align with pipeline reports.
- Support Client Managers and Business Development Managers by researching prospective new customers, supporting with initial qualification of opportunities, and setting up meetings.

CRM Management

- Maintain and manage processes to ensure customer data in CRM is up to date, identifying opportunities to make improvements to data quality.
- Generate bespoke data reports from CRM to meet colleague's needs including sales pipeline reports and distribution lists for marketing campaigns.
- Manage ongoing continuous improvements to the CRM system, based on colleague feedback and updates to business processes.
- Deliver CRM induction training to meet the individual needs of new colleagues, acting as subject matter expert for all CRM queries.

Membership services support

- Manage the application, invoicing, and welcome process for new and renewing members.
- Support Client Managers to coordinate and facilitate membership events, including

preparing agendas, taking meeting minutes, and following up on actions.

- Engage with colleagues to collate and present information on the value and benefits of being a member of Energy & Utility Skills.

Additional Responsibilities

- Compliance with Energy & Utility Skills data protection policies and processes.
- Taking reasonable care of your own health and safety and that of others in the workplace.

Key measures for success

- Timely delivery of the weekly and monthly pipeline and sales reporting.
- Effective internal stakeholder management regarding all sales activity.
- High quality and up to date CRM.
- Administration of Member renewal process within agreed time frames.
- Timely and accurate pipeline, membership and CRM reporting.

Job Holder Specification

	Essential	Desirable
Education		
NVQ Level 3 or 4 in Customer Services or ICS Professional Award		✓
Degree in Business Administration or similar, or working at degree level		✓
Work Experience		
Experience of working in a fast paced sales team within a commercial environment.	✓	
Demonstrable experience of using a Customer Relationship Management (CRM) system.	✓	
Business administration experience including data collation, reporting and analysis and taking meeting minutes.	✓	
Demonstrable experience of working with financial reporting.		✓
Understanding of the energy and utilities sector.		✓
Skills & Competencies		
Knowledge of and ability to use Microsoft Office, particularly Word, Excel and Outlook at an intermediate level.	✓	
Planning & Organising Plans activities and projects well in advance; manages time effectively; monitors performance against deadlines and milestones, used to working a fast-paced environment.	✓	
Analysing 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.	✓	
Relating & Networking Establishes good relationships with colleagues and customers. relates well to people at all levels	✓	
Writing & Reporting 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.	✓	
Decision Making & Taking Action 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