

CLIENT SUCCESS ASSISTANT ROLE DESCRIPTION

Appendix 1 – Example tasks making up the Services

Supporting the Client Success Executive and Client Success Manager in the critical path management and all administration of the delivery of our programmes. This is a critical path, task driven, administrative role with lots of variety.

The following list is representative of the types of tasks that might form part of your role:

- Become familiar with the structure and content of our training course materials and they way in which our training programmes are run
- Creating personalised web pages to host delegate induction information (on our CMS system)
- Monitor course registrations, cancellations and help to resolve participant issues within the LMS
- Keep track of accreditation paperwork following courses and chase delegates where necessary. Create certificates and dispatch to clients
- Contribute to the proofreading of learning and other materials to be used by learners
- Assemble and ensure delivery of all programme materials to each client venue in a timely manner
- Work with our experienced Trainers to prepare them for delivery of the training programme including booking of hotels, parking and travel
- Provide Trainers with detailed preparation documents, delegate and workshop information prior to delivery
- Arranging production and collation of training materials including printing, binding and sourcing of supporting tools and aids
- Arranging onsite activities during actual delivery such as recording the sessions, capturing video testimonials, photographing flip charts etc.
- Post-programme, data-entry collation of feedback
- Ensure post-programme support calls are scheduled and operating as intended. Monitor calls and send follow-up recordings to delegates
- Maintain inventory levels of training materials and reorder where necessary
- Answer the front door to visitors / manage deliveries
- Answering incoming calls into the business and transfer / handle accordingly
- Respond to telephone and other enquiries from learners (including those using our LMS platform) and provide appropriate support
- Look after outgoing post and take to post office as required
- Looking after Stationery and supplies for the delivery office and placing and checking orders as required
- Setting up the meeting room prior to bookings and clearing dirty mugs etc. after meetings.