

CLIENT SUCCESS EXECUTIVE ROLE DESCRIPTION

As a Client Success Executive reporting directly to the Senior Client Success Manager, the following list is representative of the types of tasks that might form part of your role:

- Work closely with the Client Success Manager to understand the programme requirements for each client and the timings
- Become familiar with the structure and content of our course materials and the way in which our programmes are run
- Work following a critical path to ensure that requirements for the programme delivery will be completed on time (using our task management platform)
- Work with the Client Success Managers to help design and embed new processes to support the services and programmes that we offer
- Assist in the setting up of Learner Journeys for new client programmes onto the Learning Management System (LMS) and help to ensure that all aspects of the programme are set-up to run smoothly
- Upload delegate information onto our Learner Management System (LMS) and add to existing welcome, logistics and post-workshop email campaign
- Provide the day-to-day administration and support for the learning management system and related learning technology applications as well as all those tasks required to progress learners through our learning programmes
- Provide appropriate support to learners calling or emailing in for help
- Liaising with our graphic artist to ensure that amendments and updates to materials are completed as required (attention to detail essential)
- Post programme delivery, work with the Directors to create the reports that can be fed back to clients
- Guide and direct the work of the Client Success Assistants which may include:
 - Creating personalised web pages to host delegate induction information (on our CMS system)
 - Monitor course registrations, cancellations and help to resolve participant issues in an environment of constantly changing priorities within the LMS
 - Arranging production and collation of training materials including printing, binding and sourcing of supporting tools and aids
 - Ensure delivery of all programme materials to each client venue as required
 - Arranging for on-site activities during actual delivery such as recording the sessions, capturing video testimonials, photographing flip charts etc.
 - Work with our experienced Coaches to prepare them for delivery of the programme including booking of hotels, parking and travel
 - Provide coaches with detailed preparation documents, delegate and workshop information prior to delivery
 - Post programme delivery, coordinating the compilation of feedback
 - Ensuring post-programme support calls are scheduled and operating as intended. Monitor calls and send follow-up recordings to delegates
 - Keep track of accreditation paperwork following courses and chase where necessary. Create certificates and dispatch to clients
 - Maintain inventory levels of training materials and reorder where necessary

Example expectations for our 1-to-1 coaching:

- Demonstrate a proactive approach and the ability to work in an environment of constantly changing priorities
- Create/send initial paperwork to new coaching client
- Track coaching sessions and ensure programme is running to schedule and correct paperwork completed
- Ensure follow up meetings are scheduled on completion of programme with client/client sponsor and coachee
- Liaise with Client Development to advise of programme completion so that a future call for a testimonial can be made.