

Job Description

Client Services Advisor **(1 year initial employment contract)**

About the organisation

Triangle is a values-based Social Enterprise with a vision of a society in which people are enabled to thrive. We help homelessness, health, and social care providers improve services by creating engaging visual tools and promoting collaborative ways of working. We help to enable people to achieve their highest potential, by providing a suite of tools for promoting and measuring personal change called Outcomes Stars.

The Star has proved very popular and is now widely used in the UK by charities, social enterprises and local and health authorities in a wide range of fields including mental health, homelessness, vulnerable families and substance misuse. It is also being used internationally, with a particularly strong presence in Australia.

For more information see www.outcomesstar.org.uk.

About the Role

Supporting organisations to use the Star effectively is a vital part of what we do and is core to our values. This support starts at the very beginning, when people first contact Triangle to find out about the Outcomes Stars. The Client Services Advisor plays a critical part in responding to, and managing, the growing level of enquiries and interest in the Star.

Working closely with the Client Services Manager and other staff, the Client Services Advisor will respond to incoming enquiries and advise clients on products and services.

Outcomes of the Role

- Clients contacting Triangle feel listened to and that their concerns, queries and issues are being addressed.
- After initial contact, clients have enough of the critical information they need to make an informed decision about whether the Star is the right tool for them, and if so, which version will work best.
- Clients are getting access to the right person in Triangle quickly and with the minimum fuss.
- Clients are getting the most up to date information and advice we can give them.
- Other staff in Triangle receiving clients from the Client Services Team know that the correct information about the Star, implementation planning, training and costs has been passed on to clients in an effective way.

Main tasks

Respond to telephone and email/website enquiries to:

- Be responsible for building the initial relationships with the right people in the organisations who contact us.
- Understand how clients work, the service they offer, and the people they support.

- If the Outcomes Star model is right for them, understand what their outcome measurement needs are, and help them to think about where their service users already are in relation to the journey of change.
- Identify with the client the best way of measuring and evidencing the change that they want to show, including providing demonstrations and advice about the Star Online.
- Identify and advise of the best version(s) of the Star for their service, and if the Star is not the right tool, be clear as to the reasons why.
- Support the client to think about how the managers will promote the implementation of the Star and support their workers to engage with the tool by creating an implementation plan.
- Think creatively for clients who do not fit the standard pathway, working flexibly with colleagues to find options that work, and to be as responsive as possible whilst always remaining client centred.
- Ensure all clients receive appropriate and timely support, working with the Client Services Manager and delegating as appropriate to colleagues in other teams.
- Liaise with other Client Services and Training team members about the organisation of training and licensing, and offer support if required to the Client Services Co-ordinator with regards to training courses.

In addition to this the Client Services Advisor will:

- Use our Client Relationship Management (CRM) system (Salesforce) to produce and send out quotes and to ensure we keep accurate records of clients, enquiries and support needs.
- Provide account maintenance to existing clients, including licence adjustment, discussing new Stars, additional training, liaising with the Finance Team around invoicing and updating any changes to key contacts.
- Use Salesforce proactively to identify ways of following up with those clients who have not responded after the initial discussions have taken place, with a view to increasing uptake of the Star.
- Retrieve information to work with other colleagues to improve the service we offer for our clients.
- Contribute to the development of resources needed for our clients, including providing written information, working closely with the Client Services Manager.
- Contribute to development of new internal systems and approaches.
- Collaborate with other staff members to develop marketing campaigns.
- Collaborate with colleagues to deliver a diverse range of services for our clients such as supporting demonstrations and Webinars as necessary.
- Support the induction process of new colleagues by training/orientating them to use the relevant sections within Salesforce to ensure they have the correct understanding of how to use the system.
- Other tasks as required.

Person specification

Essential

- Customer service, client relationship or related experience
- Working knowledge of one or more of the main service sectors where the Star is widely used, for example family and children's services, homelessness services, employability services
- Clear, warm and helpful telephone and written communication skills
- Ability to develop and build strong relationships with both clients and colleagues

- Excellent organisation and record-keeping
- Ability to work independently and as part of a team
- Ability to prioritise competing pressures and meet deadlines
- Ability to learn quickly
- Commitment to delivering a high quality service
- Good IT skills including MS Office

Desirable

- Experience of using a CRM System
- Experience of using the Outcomes Star

Reporting to: Client Services Manager

Triangle is committed to supporting staff to reach their highest potential and there may be opportunities for development as the organisation continues to grow.

Location

The post will be based in our main office in Hove and we are open to flexible working arrangements, including work from home. There will be regular travel to meetings in our Hove office and in London once this is permitted again and safe in the context of the Covid-19 pandemic.

Terms and Conditions

We are recruiting for a full-time role (35 hours/week) and are open to applications for less hours with a minimum of 3 days per week. The role is for 12 months initially, with a chance to move into a permanent position thereafter.

Salary and Benefits

- The annual salary range is £24,000 - £28,000 per annum (full-time) – part-time will be considered
- Laptop and mobile phone provided for work purposes
- Generous pension scheme, flexible working arrangements, employee assistance programme, cycle to work scheme
- 25 days' annual leave plus bank holidays (pro-rated for part-time)

Deadline for applicants: 19th April 2021, 12pm

Interviews will be arranged on 27th and 29th of April using Zoom

STRICTLY NO AGENCIES

Triangle Consulting Social Enterprise, March 2021