

Job Description

Maternity Leave Cover for Client Services Coordinator

(Employment Contract for 1 year Maternity Cover)

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. A key element of this support involves the delivery of first-class training and learning through a variety of channels, including face to face and remote sessions. The Client Services Coordinator plays a critical part in responding to, managing, and co-ordinating the large number of training courses that new and existing clients require.

Working closely with the Client Services Manager, the Training Manager, and other staff, the Client Services Coordinator will organise all aspects of the training sessions delivered by Triangle.

Outcomes of the Role

1. Clients have a training date and a named trainer.
2. Open courses have the correct number of Stars and attendees, and the attendees know where to go to be trained if face to face and how to log in if remote.
3. Trainers are confident of who the client is, what their needs are, where they need to go to do the training, and that the correct materials will be available for the client to access during the training session.
4. Quotes are followed up and chased to ensure the client is in agreement with our terms and conditions before proceeding with training.
5. All the required processes that ensure clients get trained are managed solely by this role.

Main tasks

1. Liaise with clients and the training team to find suitable training dates, working closely with our Training Manager and network of trainers to achieve this.
2. Once dates have been agreed, manage the booking process and administration for these courses – update our CRM to reflect full training details and information required for licensing, and send clients pre-training forms to complete.
3. Manage booking process and administration for all Open Core Courses for individual users and small groups. Liaise with Training, Client Services and Implementation teams to ensure courses are filled appropriately, monitoring numbers and ensuring participants are grouped suitably according to Star.
4. Manage mop-up training for non-attendees of remote/face to face training, using the same model and considerations as for the Open Core Course.
5. Ensure clients have submitted all information requested prior to training, enabling trainers and other colleagues to deliver the best training experience for the client.
6. Liaise with materials colleague so they have the information required to send the correct training materials (if applicable) in a timely manner.
7. Check invoices have been sent in plenty of time for training to allow clients to pay, work with licensing colleague to prevent delays with licence activation, which links to training dates.
8. Create personalised certificates using Adobe, and issue to attendees on completion of training.

In addition to this the Client Services Coordinator will:

- Use our Client Relationship Management (CRM) system (Salesforce) to produce and send out quotes and to ensure we keep accurate records of clients, their history and requirements.

Person specification

Essential

- Ability to develop and build strong relationships with both clients and colleagues
- Excellent organisation and record-keeping
- Excellent attention to detail, and a thorough and methodical approach to tasks
- 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
- Experience of using a CRM system

Reporting to: Client Services Manager

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 might be occasional travel to meetings 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 4 days per week. The role is Maternity Cover for 12 months initially, with an option to extend.

Salary and Benefits

- The annual salary range is £22,000 - £28,000 per annum (full-time) – minimum of 4 days per week 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: 9th June 2021, 12pm

Interviews will be arranged 22nd and 24th June using Zoom

STRICTLY NO AGENCIES

Triangle Consulting Social Enterprise, May 2021