WORKFORCE SOLUTIONS | TALENT MANAGEMENT | SELF SERVICE

POSITION DESCRIPTION

Position:	Client Relationship Manager
Department:	Sales and Marketing
Incumbent:	
Reports to:	Head of Sales and Marketing
Date:	July 2021

ROLE FUNCTION

Engaging our existing and newly acquired client base with a focus on relationship, client retention, additional revenue opportunities, and credibility growth.

Relationship and Retention

Client Relationship Managers (RM) will be required to, for all allocated clients:

- Contact all clients verbally at a minimum once per quarter, 3rd of clients each month
- Be the face of ConnX in promoting our Brand, Vision and Mission
- Improve retention of clients
- Create and maintain relationships with key stakeholders at a minimum the decision maker, decision influencers and operational contacts
- Expand the awareness of ConnX within the client
- Improve client functionality usage of the existing solution
- Enhance attendance at ConnX branded events (online and otherwise)
- Identify additional reference sites and case studies and assist in preparation of marketing, if required.
- Communicate all positive and negative feedback from clients as required
- Manage the 'at risk' status of clients

- Escalate clients to your manager that move into the 'at risk' status with reasons. Internally communicate success with reasons of clients that move out of the 'at risk' status.
- As agreed with your manager, be involved in request for tender, request for proposal, request for information documents including completing documentation and performing product presentations for client retention
- Update contacts within clients, as they become known to you, and communicate contacts that have left the client for further investigation
- Approach clients directly when there are changes to either Primary Client Contact or any Key contact within the client (e.g. HR Manager), welcoming them to ConnX and introducing yourself and the Client Success team, the full suite of services we can assist with; and a report on the status of this client
- Refer integrated partner products and solutions, where those fit the client needs
- As you become aware of issues with partner solutions, especially those referred by ConnX, be the primary contact point within ConnX, and liaise with the partner in resolving those issues
- Develop a client profile of all people management products used at that client
- Solicit feedback from clients on all people management products used
- Escalate 'lost clients' to your manager to perform a lost client analysis if a client informs us they are no longer going to use ConnX, or if the client has requested a reduction in their renewal period (e.g. from annual to 6 monthly)

KPIs

- Relationship building, contact of all clients in designated patch
    - Phone and email contacts
    - Attendance to ConnX branded events
    - Membership in ConnX social groups (e.g. LinkedIn groups)
    - Maintain all existing referenceable clients, 2 new referenceable clients per quarter
    - Maintain all existing case study clients, 1 new case study client per half year
- Client retention
    - Analysis on clients that were lost and deemed 'saveable'

Revenue Generation

Client Relationship Managers (RM) will be required to, for all allocated clients:

- Engage with and present new modules
- Assess the fit of existing modules the client does not have, and if suitable, present modules. If un-suitable, share feedback, reasons, etc. with the wider ConnX business
- Propose and acquire module sales from software presentations
- Determine client re-training requirements for existing staff already trained in ConnX or new hires at the client
- Propose and acquire sales of re-training needs in consultation with the wider ConnX business

- Propose and acquire additional components of an existing modules, e.g. additional careers sites, additional onboarding sites and templates, additional timecard rulesets, sandboxes, additional instances
- Follow the sales handover processes to Client Implementations for modules and re-training
- For client extension employees of 200 employees or more, discuss and provide the extension employee proposal to the client
- For custom work requested by clients to the RM, act as the single point for ConnX on the custom development work (confirming requirements, providing proposals, and confirming with the client the work satisfies their needs)
- For one off client events, such as but not limited to, company mergers, company de-merges (splits), payroll system changes; act as the single point for ConnX on work required (as above)

KPIs

- Agreed targets for each stream that can be influenced by the RM directly (e.g. new modules and re-training, not for custom work or one-off events)

Additional Duties

- Ensure all request are responded to in a timely and professional manner
- Ensure all documentation is accurate and completed in a timely manner
- Meticulous record keeping of client interactions in the CRM
- Work closely with the Sales Team in sales initiatives
- Work closely with the Client Success Team for delivery of services
- Set and attend client handover meetings for agreed client purchases
- Attend and participate in all Product sessions to learn what's changing in ConnX
- Co-ordinate, but not do, custom work and one-off events where support and development team assistance is required
- Ensure completeness of information for handovers to appropriate teams
- Assist with information gain on improvements to new and existing offerings
- Involvement in Client Social Media and awareness campaigns
- Develop thorough knowledge of full ConnX solution, enhancements, upgrades, new modules, marketing campaigns
- Develop relationships with partner solutions (if/ where appropriate)
- Complete all internal reports as directed by your manager
- Gather market intelligence and trending

- Involve and frequently engage with additional ConnX resources to assist with the role
- Attendance and contribution at internal meetings
- Attend trade shows and conferences (where appropriate)
- Attend client based user group meetings and document discussions and outcomes
- Other duties as required by the Head of Sales

KPI

- Interaction with other ConnX staff members

Personal Attributes

Effective Communication

- Expresses concepts and ideas clearly and concisely
- Actively listens
- Uses language and tone appropriate to audience
- Speaks with confidence and clearly in front of an audience

Quality Orientation

- Work is performed to a high standard, completed within appropriate timeframes and undertaken in an efficient manner

Initiative and Innovation

- Generates creative solutions
- Uses different approaches to resolve issues/develop opportunities
- Generates ideas for improvement
- Takes productive action without being asked

Teamwork

- Actively encourages a supportive team culture
- Encourages the free exchange of information and ideas
- Encourages open and honest feedback
- Takes responsibility for team duties and contributes

Service Orientation

- Demonstrate a willingness to help
- Demonstrate a positive attitude in communications
- Well groomed and presentable

This role is	This role is not

involvement in new client meetings before the sale, for clients that will be allocated to this role	New business sales management, presentations, proposals, closing
client meetings to present ConnX to existing clients	Pre-sales presentations for new clients
involvement in marketing to existing clients, but not responsible for marketing	New business marketing
involvement in tenders for existing clients including completing documentation as agreed with your manager	Tender responses for new clients
attendance at conferences and webinars as agreed with your manager	Organising and arranging conferences or webinars
Project awareness of implementation but not management Project management of specific client events (e.g. mergers and splits)	*Delivering* any client service including • Helpdesk • Training or Implementation • Project management of implementation • Custom work
Sharing information and assisting other teams with these items in a limited capacity	In-depth market analysis and feedback; Product Direction; Specifications
Extension module sales for existing clients not allocated to sales person or existing clients commenced implementation more than 12 months ago including additional Careers sites, additional Onboarding sites and templates, additional Timecard rulesets, unless agreed in advance by your manager	Extension module sales for new clients in the first 12 months sold by a ConnX BDM, unless agreed in advance by your manager
Extension employees of 200 employees or more	Extension employee sales less than 200 employees
	Client escalation of implementation issues, or helpdesk issues
	Product Testing and Documentation other than user acceptance testing performed by all staff at ConnX
	Internal staff product training outside the Sales team