

Role Description

Role:	Head of Client Services
Business function:	Client Services
Reporting to:	Co-founder and Commercial Director
Managing:	Account Management function
Prepared on:	9 Nov 2020

1. Purpose and Scope

The purpose of this Role Description is to describe the **Head of Client Services** role.

To define, manage and proactively deliver a documented, Board-agreed, new client services strategy for Fresh Egg.

To have overall responsibility for the strategic management of the client services function, ensuring the development of strong client relationships, supporting the successful delivery of all services, and driving profitable retention and growth across the existing client base. To work closely with the Head of Business Development to ensure excellent service and growth across the whole customer journey.

Maintaining a happy and motivated team, leading with commercial experience to drive business growth for both Fresh Egg and its clients.

This role description is not inflexible but is an outline and account of the main duties and capabilities. The role holder should however carry out any other reasonable duties commensurate with the role, as the needs of the company require.

2. Role Responsibilities

2.1 Functional head responsibilities

- To support business growth with clear focus on clients and employees as part of the senior team
- To create, maintain and communicate the functional strategy and roadmap for each financial year, aligned to the agency's growth, strategic direction and goals
- To hold overall responsibility for function performance and target achievement and to collaborate with the Board on the setting of annual budgets and targets
- To thoroughly understand digital trends in relation to our clients' businesses to enable the development of relevant strategic plans
- To champion continuous improvement of efficient processes and workflows

- To proactively work with and support other teams in delivering business growth
- To support team members in achieving their performance objectives
- To line manage and mentor the team effectively through a coaching style of management and to support them in achieving their objectives and overall career progression. To carry out all day to day elements to include recruitment, appraisals, 121 meetings, team meetings, personal development plans, identifying training needs and performance management
- To ensure that HR are involved with all key personnel issues, contractual changes, performance management and development plans

2.2 Key responsibilities

- To define, manage and proactively deliver a documented, Board-agreed, client services strategy for Fresh Egg, updated annually. To include specific focus on how we can grow more clients into Tier 1 and Tier 2 in the agency
- To continuously assess our client services charging model and make recommendations to the Board for improvements, ensuring that we are getting paid for the time and value that we are delivering
- To ensure that we are reporting on profitability across the client base
- To ensure the team maximise revenue from clients by cross-selling and up-selling
- To ensure all communication both written and verbal is delivered to a high standard and adheres to the Fresh Egg brand
- To work with the business development function to ensure excellence throughout the client lifecycle
- To be responsible for review and approval of financial quotations produced by the team
- To be the escalation point for any client services issues and to resolve effectively
- To review and manage client RAG reporting
- To ensure efficient and consistent team processes are defined, documented, implemented and maintained
- To provide strategic recommendations for client-relevant content to be included in FreshThinking and other Fresh Egg marketing and communications
- To work proactively and collaboratively with the resourcing team and relevant Heads of Department to assign the optimal specialist teams to client work

- To build, manage and maintain a substantial, high quality pipeline and to ensure that all existing client pipeline activity is accurately documented and kept up-to-date in the Synergist CRM system
- To work with the business development department leadership to define and embed a high-quality onboarding process into the agency and to ensure that agreed onboarding roles and responsibilities are undertaken on time and to the highest quality
- To identify blockers in the client services process and work collaboratively with key internal stakeholders to remedy these

2.3 KPIs and reports

- To meet or exceed team, retention and growth performance targets
- To report on RAG reporting and where any issues are reported detail actions to be taken on a monthly basis
- To produce summary monthly reporting for the Board on the performance of both individual team members and the department as a whole
- To put into place and maintain additional KPIs for the department to assist quarterly forecasting
- To summarise and share relevant departmental activity, successes and initiatives at agency huddles and Share & Trades
- To report on overall client satisfaction in line with Net Promoter Score benchmark on a six-monthly basis, to include strategic actions to be taken to improve results

2.4 Best practice and organisation

- To keep fully up-to-date with industry developments
- To identify, evaluate and share resources, tactics and techniques, freely sharing knowledge, insight, best practice and ideas across the agency
- To work closely with other core business functions to ensure they are kept up-to-speed with all relevant client services initiatives, in order to eradicate silos, ensure positive buy-in and inspire common thinking across the agency
- To represent Fresh Egg at industry events when required and to represent the Company in a professional and knowledgeable manner

Key behaviours should be aligned to core values at all times.