

Job title: Consultant (including the initial progression stages of Trainee Consultant and Newly Qualified Consultant)

Reports to: Consultancy Services Manager

Summary of job:

To consistently exceed the expectations of your customer ensuring mutual success. To represent Assurity Consulting in a professional and competent manner at all times, complying with your contract of employment and company policies. Sell, service and deliver workplace management solutions to prospects and customers. Work to agreed specifications, maintaining and developing relationships and actively pursuing and securing new business. Keep accurate, up to date records and effectively communicate all customer expectations and business activities.

Progression within the job:

The time frames set out below assume no previous relevant experience. Those with relevant experience can expect that time frames will be shortened in accordance with a personalised training plan:

Trainee Consultant – A new recruit who has not yet passed a competency test to deliver a technical service. They should expect to be promoted to a Newly Qualified Consultant within 4 months of their start date. While they remain a trainee they can expect to be accompanied during every visit.

Newly Qualified Consultant – An employee who has passed a competency test to deliver a technical service, but is still learning the commercial and account management responsibilities of the role. They can expect to be promoted to a Consultant within 1 year of joining the company when they have achieved the following:

- Met or exceeded their sales and invoicing targets for two consecutive quarters;
- Successfully managed a repeat customer contract;
- Attended a seminar or event run by our company and a networking event by an external organisation; and
- Demonstrated they can plan effectively by meeting the targets for report production and delivery.

Consultant – An employee who has met the requirements of a Newly Qualified Consultant and is capable of carrying out the whole job. They should be:

- Delivering a technical service.
- Achieving their annual new and existing customer sales targets.
- Achieving their annual invoicing target.
- Managing more than one repeat customer contract.
- Completing contract renewals successfully.
- Regularly attending seminars and networking events.
- Meeting performance standards for report production and delivery.

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Responsibilities and duties:

General

1. Represent Assurity Consulting in a professional and competent manner at all times.
2. Comply with your contract of employment and company policies.
3. Be accountable for the effective use of working time to meet objectives agreed each year with your Consultancy Services Manager.
4. Understand and be conversant with the Assurity Consulting business plan.
5. Attend meetings.
6. Maintain and care for equipment, ensuring calibration at appropriate intervals. Understand and comply with the Assurity Consulting quality standards. Adhere to the Assurity Consulting ethos of 'right first time'

Commercial Responsibilities

1. Secure new business from existing customers and prospects.
2. Assist in the research and development of new services and new markets.
3. Understand the markets in which Assurity Consulting operates and the solutions and services we provide.
4. Research targeted prospects.
5. Generate sales leads and appointments by telephone, from targeted prospect list.
6. Follow up leads generated by prospect list, referrals, existing customers and marketing initiatives.
7. Produce and present proposals to customers and prospects.
8. Develop new customer accounts into repeatable business.
9. Communicate effectively the customer requirements to your colleagues to ensure you exceed customer expectations.
10. Network at marketing and industry events to build new relationships.
11. Present at marketing and industry events to promote our services.
12. Research and record competitor activity.
13. Remain current with competitor capabilities for all Assurity Consulting services at all times.
14. Practice and role play commercial situations to improve competence and confidence.

Service delivery

1. Schedule and adequately prepare for site visits.
2. Undertake site visits.
3. Analyse and interpret your visit findings and compile a clear and concise report for your customer.
4. Personally present Assurity Consulting reports.

Appendix 1

5. Provide competent advice to customers on areas relating to Workplace, Health, Safety and Environmental issues.
6. Fulfill the requirements of the Assurity Consulting customer service level agreements.

Account Management

1. Spend the appropriate amount of time with each customer to form and develop effective relationships.
2. Deliver services to each customer within contracted specifications and meeting customers' expectations.
3. Regularly obtain feedback from customers on levels of satisfaction with current scope of service and on any new areas they need support with.
4. Successfully complete contract reviews within the appropriate time frames.
5. Produce and update your customers' organisational profiles to maximise commercial opportunities and anticipate commercial threats.
6. Undertake strategic account reviews to identify commercial opportunities.
7. Arrange for customers to visit our office and use the laboratory tours and business services presentations to further develop customer relationships
8. Keep your customers happy.

Administration

1. Keep accurate, up to date notes and records on our Customer Relationship Management system (CRM).
2. Plan site visit dates accurately and update regularly.
3. Keep accurate and up to date details relating to sites, contacts and companies.
4. Keep detailed notes from all conversations with customers and prospects and add them accurately and promptly to our Customer Relationship Management system (CRM).
5. Prepare detailed proposals as per requests from customers and prospects.
6. Prepare all required information prior to each monthly review meeting with your Consultancy Services Manager.
7. Keep your outlook diary up to date at all times with all activities and keep your support co-ordinator aware of your location at all times.
8. Complete all actions outlined on your CRM dashboard within agreed time frames.
9. Write a status report of all outstanding work activities before any annual leave and submit to your manager.
10. Provide customer reports that are right first time.

The Company reserves the right to change or amend both job title and specific duties as required in order to meet changes in the Company's business plans etc.