

Role Description for Relationship Manager

Section 1 – Overview

1. General details

Role title	Relationship Manager
Location	Melbourne, Victoria, Australia
Position reports to	Corrinne Armour - Director
Date	July 2019
Hours	Flexible part-time role (3.5 days a week, ideally over 5 days)
Location	Working from your own home office and from Corrinne's home office in Ormond, Victoria.

2. Role overview

Primary purpose	<p>The primary objective of this role is to work closely with Corrinne by focusing on supporting the sales and marketing function:</p> <ol style="list-style-type: none"> 1) Identify, research, nurture and develop potential clients 2) Draft and review marketing and communication documents 3) Build Corrinne's speaking business. <p>You will be happy to fulfil a support role so that Corrinne can continue to help her clients be successful.</p> <p>As at July 2019, the practice includes:</p> <ul style="list-style-type: none"> • Leadership training, team development training and facilitation • Keynote speaking • Leadership coaching • Leadership Books
Functions of the Role	<ul style="list-style-type: none"> • Business Development/Sales • Marketing and PR support • Support • Ad Hoc Project Management

3. Our clients

Our clients are senior leaders and teams from across a spectrum of corporate, SME, government, health and community sector organisations. A diverse mix and yet they all have three things in common:

1. They see the importance of developing leadership - Fearless Leadership – and are willing to be uncomfortable
2. They put value on people – more than having a poster in reception saying ‘Our people are our most important asset’
3. They have senses of ‘community’

4. Key working relationships

Internal stakeholders	Interdependencies
Corrinne Armour - Director	Work with Corrinne to meet sales targets and ensure delivery of all programs, courses and workshops sold.
Business Manager (Virtual position – Philippines based)	Work closely with BM, especially on diary management and client handover
Virtual Assistant (Virtual position – Philippines based)	Work closely with VA, especially on social media and production of marketing material

External stakeholders	Interdependencies
Clients & potential clients	Liaison on sales/business development
Sales Coach	Monthly sales coaching to support business development
Suppliers and outsourced providers	Marketing and sales collateral
Event/Conference Managers/Speaking Agencies	Event attendance/support as required
Project Partners	Coordination of joint projects as required

Section 2 – More about the role

Function	Accountability / activity
Business development	<ul style="list-style-type: none"> • Provide the first contact for potential clients seeking to work with us • Nurture prospective clients to the point that they want to do business with us • Proactively support the sales role to nurture potential clients, and support additional clients to take on new programs • Research, refine and target sales. This includes responding to phone and internet enquires and cultivating warm or cold leads. • Book meetings and explain and take payment for lower price programs • Ensure CRM system is up to date and reflects all sales activity • Data mine CRM and social networks for potential sales • Refine our use of CRM to focus on automation and productivity in an ongoing way • Be across Social Media platforms (predominantly LinkedIn) • Identify and research opportunities to develop the speaking aspect of the practice • Work with Corrinne to identify and enact next steps in sales lead process, including a weekly sales funnel review • Work with Corrinne to develop sales strategies, and to set and track quarterly sales targets • Provide sales support at events • Prepare sales documents such as project proposals
Marketing and PR	<ul style="list-style-type: none"> • Work with Corrinne to develop and implement marketing strategies • Work with admin assistant to implement marketing campaigns such as mails outs, newsletters and other communications • Draft marketing content. Proof read and provide feedback on posts and other content Corrinne has written • Work with admin assistant to ensure content on website is up to date and aligned • Boost Corrinne’s social media profile by identifying and leveraging opportunities • Assist with identifying topical areas and events for media commentary

	<ul style="list-style-type: none"> • Bounce ideas around with Corrinne – be a sounding board
Admin	<ul style="list-style-type: none"> • Liaise with Business Manager on diary management for business opportunities • Remove friction from Corrinne’s world locally (remembering her Business Manager and Admin Assistant are off-shore) so that she can focus on Thinking, Selling and Delivering. This might include packing books for a mail out, or preparing report packs for a workshop • Arranging the printing of mass produced or specialist workshop and marketing material. Printing and completing books and workshop manuals, etc
Ad Hoc Project Management	<ul style="list-style-type: none"> • Bounce Project managing large initiatives for example, new website, new product launch, book marketing, etc

Section 3 – More about the person

1. The person required for the role. These ones aren’t optional – to work with us you will have to have them all.

Values strong and healthy relationships, a team player	<p>Strong, open and healthy relationships are important to our business – in fact they are our business! Accordingly, you like interacting with other people and are at ease with developing relationships with different kinds of people. This job is a front-end sales support role, and you must be happy to move from one client to the next as they progress through our ‘sales funnel’.</p> <p>You are open to honest conversations, giving and receiving feedback, taking care of people, and pride yourself on having great working relationships.</p> <p>We are a small team, made more complex by not working in the same place, and a commitment to team is critical.</p> <p>Given a significant part of the role is virtual, you will also need to be happy to work alone.</p>
Excellent verbal and interpersonal communication skills	<p>We are a people business and building relationships with people is critical. You must be able to have open and honest conversations, and give and receive feedback respectively and constructively.</p>
Creative. And happy to follow process.	<p>This is almost a contradiction! Idea generation and process improvement are important. You will also love things to be organised,</p>

	and happy to follow a process. Ideally good at systemising and making things easier, for us and our clients.
Make things happen	Responsible, proactive, self-motivated, use initiative, results-oriented. With strong time management and organisational skills, you will need to balance competing demands. Happy to work autonomously <u>and</u> the willingness to take specific direction on occasion as well.
Flexible. Comfortable learning new skills and change	Professional development is intrinsic in the work we do with our clients. It is important our team also value professional development. The enterprise is a growing practice therefore new demands, accountabilities and skill requirements are likely to arise. You cannot be afraid of change, nor attached to the work you have done. Things can (and do) move very quickly here, and you will need to respond. A willingness to ask when unsure.
Open to adventure	Our quest is Fearless Leadership and we don't always know where that will take us, or how. Life is fun, and while building the practice and protecting the brand is critical, engaging whole-heartedly along the way is vital.
Discretion and confidentiality	This role involves dealing with confidential client (individual and organisational) information sensitively. We also work within the Professional Code of Conduct of the International Coaching Federation.

2. The skills required for the role. This is our ideal list. You may not tick all the boxes, and the skills are listed here in priority order.

1) Business Development	Our sales approach is very much one of building relationships that deliver value for the right type of clients, and not of pushing sales. ('this is what we do, and how we help people... this is the kind of people we work with... this is the value you can expect... would you like to work with us?') You will provide the 'front end' to our business development process, finalising small sales and setting up for Corrinne to make larger sales. A strong goal orientation will help. We want you to celebrate our successes with us. We expect you will enjoy 'living' in a CRM! We have sales processes set up, and we will want you to follow them, while ideally challenging and improving them.
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2) Customer Service	We sometimes work on a short turnaround - sometimes clients are with us for a long time, even before the main game begins. We look after our clients well throughout – no compromise!
3) Marketing & PR	Across strategic marketing and PR, especially as it applies to a Thought Leader ‘product’ (and not a commodity product). Understand how to refine and target markets. Confident with leveraging LinkedIn to boost profile.
4) Writing skills	The ability to write well is highly desirable in this role – drafting brochure content, client correspondence, reviewing and providing input to Corrinne’s writing.
5) Event management experience	Experience in coordinating events from idea through to wind up and review An understanding of the speaking business would be highly desirable

3. Your experience - Given your highly developed skills in nurturing leads and building business relationships, you may have come from a career in:

Business development/sales	Corrinne’s sales style is relationship-based, offering value underpinned by thought leadership. It is not ‘hard selling’, and so your sales style needs to be consistent with this
Marketing	Understanding and communicating to customers
Customer Service	We want our clients to want to work with us because they want to work with you!
Event Production	Managing the staging of events
Relationship focused roles	Teaching, training, EA – as long as you are comfortable with sales

4. Fundamental requirements

Availability	This is a flexible part-time role over 3-5 days per week. We will want you available when our clients need us – usually business hours. Occasionally after-hours work will be needed, typically for events. You will also need to be mobile so you can help us transport things for events.
Work environment	Given that you will do much of your work at your place, you will need an appropriate work environment set up.

Technology	<p>Must have access to high speed internet and reliable and up to date technology. Some of the technology you will need to know or learn how to use fairly quickly...</p> <ul style="list-style-type: none">✓ Word and Excel✓ Zoho (CRM)✓ LinkedIn✓ Zoom (virtual meeting platform)✓ Gmail Suite
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