

## CLIENT SERVICES MANAGER JOB DESCRIPTION & PERSON SPECIFICATION

**NAME:**  
**COMPANY:** BI WORLDWIDE  
**DIVISION:** Client Services Team  
**REPORTS TO:** Senior Client Services Manager / Client Account Director

### KEY PURPOSE OF ROLE:

Working within the Client Services Team, this exciting position required the successful applicant to be responsible for delivering client projects to a high standard of excellence, while maximising revenue and profit for the company, and ensuring client retention and satisfaction. You will manage the financial aspects of client jobs, including using Maconomy (our Finance system) to set up jobs and budgets, monitor cost and time allocations, keep budgets up-to-date, run and check redemption reports and issue invoices. Within existing accounts, you will work with your CAD/Client Relationship Director and others to upsell current projects, cross-sell BIW's services and identify new opportunities, in order to maximise revenue and profit per client.

### Principal Responsibilities:

- To play the lead role in the delivery of client projects, including client liaison, management of internal resource departments and management of external suppliers
- To be the escalation point of contact for all participant queries via phone and email
- To manage in the delivery of the programme communication plans
- Responsible for developing, maintaining and keeping up to date all programme websites via a content management tool
- Responsible for working with the client and BIW's data team to define what data is required, in what format and the frequency that it is required as well as determining how the data can be imported/integrated into the programme's system
- Be responsible for creating, updating and maintaining promotions within an access database
- Creating the design briefs and briefing the internal creative department
- Briefing and working closely with Technical Project Implementation Managers to create project change orders for existing programme systems, briefing the technical department and testing the systems once developed
- Supporting on event proposals when communications and on site collateral is required
- To set up and lead client meetings (where appropriate), creating agendas, communicating, creating and following up on contact reports
- To manage all financial aspects of client projects, including using Maconomy to set up jobs and budgets, monitor cost and time allocations, keep budgets up-to-date, issue invoices, close jobs and set up purchase order trackers
- To project manage client jobs, including taking responsibility for timelines, reporting, management of client and participant communication including contact reports, status reports and maintaining electronic and paper (if applicable) files up-to-date

- To work with your SCSM/CAD/CRD to actively identify new business opportunities within existing accounts and upsell existing projects; and to play a lead part in the account development plan for each client
- To own responsibility for contributing towards a team GP targets by ensuring timesheets and budgets are kept up to date and all work is quoted and approved by the client before commencement
- Line management or supervisory responsibility for Client Services Executives

### **Resources Accountable For:**

#### **People:**

- You may have line management responsibility for Client Services Executives which includes the management of 1:1s, appraisals, development plans, performance management and maintaining HR files. Alternatively the role may have only supervisory responsibility where you are required to manage workload and priorities
- Lateral project management responsibility for support departments in the delivery of client projects
- Close working relationship required with SCSM/CAD (Retention & Growth) and CRD (New Business Development) in maximising outstanding service to existing clients, and maximising business opportunities

#### **Budget:**

- A personal contribution to team and company targets by ensuring timesheets and budgets are kept up to date and all work is quoted and approved by the client before commencement
- Managing client project budgets, monitoring cost and time expenditure, invoicing, identifying uplift opportunities and rebilling all costs profitably

### **Principal Working Relationships (Internal & External):**

#### **Customers:**

- A point of contact for all clients and participants with 20% - 30% of your time to be directly client-facing or telephone based

#### **Internal Customers:**

- Developing positive relationships across a number of internal departments i.e. Technical Services Group, Network Services Group, Creative, Finance and HR
- Productive, inspiring and positive working relationships required with all associates, particularly in developing compelling client solutions and delivering excellence to clients

### **PERSON SPECIFICATION:**

#### **Essential Skills & Experience:**

##### **Experience:**

- The successful candidate will ideally be a graduate (will consider all fields) and have experience of working client-side within an agency environment in a similar role however this is not essential
- Significant client management experience
- Substantial project management experience, including responsibility for meeting deadlines, reporting on progress and leading project teams

- Demonstrable financial management experience with evidence of managing costs or monitoring budgets including working on a Finance system
- Experience of working with technology and systems i.e. websites
- Experience of working with and analysing complex data
- Excellent IT literacy, including good knowledge of MS Word, PowerPoint, Excel, Access and Outlook

**Skills:**

- Excellent interpersonal skills with the ability to build positive relationships at all levels and with all types of people
- Good verbal and written communication skills with clarity of expression
- Commercial outlook with a passion for quality
- Credibility in front of clients
- Excellent time management and task management skills