# Consultancy Support Specialist – Roles and Responsibilities

This role exists to provide an essential link between our membership service clients and their advisors. This role will assist us in providing a truly joined up service to our clients enabling them to further improve their health and safety standards.

* Manage the diaries of the safety team while liaising closely with them and providing a flexible level of support
* Ensuring the clients are using the Membership Service to the full, giving them good value for money and strengthening client retention.
* Ensure Annual Review Meetings (ARMs) and their write ups are planned, booked, entered in diaries and carried out on time
* Managing site inspections to suit client needs and diary efficiency
* Liaise with clients and safety staff over level of site inspections required
* Carry out regular calls to clients discussing actions and recommendations arising from ARM meetings and booking in work that arises from calls.
* Take training bookings for open courses over the phone and via email
* Enter/ update chargeable work on SafetyNet (CRM System) and follow up to ensure work has been carried out and completed.
* Update the reporting spreadsheet weekly to reflect consultancy work and site inspections carried out.
* Ensuring templates for SafetyNet are up to date
* Issue membership certificates/ login details/ contact details for new member clients.
* Ensure all details are up to date and correct for new and existing clients
* Using report functions within SafetyNet to inform priorities and assist the safety team with statistical information
* Update client interactions on SafetyNet.

Reporting to the Operations Manager and Senior Safety Consultants

Consultancy Support Specialist – Values Driven Behaviours

The behaviours associated with the role of Consultancy Support Specialist are derived from our core company values. These values point to key behaviours that guide us in how to do our job well. The success of our role and ultimately, the success of the company depends on us embodying these values and adopting and adhering to these behaviours.

Examples of specific behaviours are listed below.

## Professional

* Being courteous with clients and fellow staff members.
* Making sure the content of phone calls to clients is relevant
* Informing management team of any issues arising with work
* Being punctual at all times
* Conducting actions promptly, including responding to queries, conducting calls and booking in work
* Being knowledgeable about the resources provided to clients
* Dressing smartly in the office
* Ensuring emails and documents are of high quality and are grammatically correct
* Answering the phone as soon as it rings.
* Ensuring KPI figures are up to date
* Allocating sufficient time for work to be completed and ensuring fees are appropriate
* Being aware of live issues relevant to our work
* Being aware of changes to company procedures

## Friendly

* Assisting other administrators when needed
* Maintaining contact with advisors following ARM meetings and keeping an awareness of client’s needs
* Bringing a positive, can-do attitude into the office
* Being approachable to all staff members
* Maintaining a good rapport with clients
* Use previous client comments as a research tool before conversing with clients
* Assisting fellow administrators with workload
* Being aware of the realities of working in an open plan office and being considerate to other office users

## Practical

• Keeping tidy and useful notes before passing on queries promptly

• Allocating work into diaries in the most efficient way possible, while liaising with the management team over specific goals for career development

• Ensure SafetyNet is kept up to date across all categories

• Organising administration workload efficiently

• Ensuring invoicing descriptions for consultancy work are detailed and relevant as to avoid accounts queries

• Being on hand to assist in problem solving

• Ensuring all forms, paperwork and admin are in place and stored/filed correctly

• Considering other departments when making changes to diaries

• Considering the logistics of travelling before scheduling offsite work

• Attending meetings fully prepared with the information to hand

• Considering the commercial implications of allocating work to an advisor