

<b>Name:</b>	
<b>Title:</b> Commercial & Customer Experience Assistant	<b>Department:</b> Commercial
<b>Reporting to:</b> Head of Commercial/ Customer Experience Team Leader	<b>Grade:</b> 7

**Job Purpose:**

Reporting to Head of Commercial (HOC) this is a split role operating across the Commercial Sales and Customer Experience teams. The post will provide administrative and operational support to the sales and account management functions to support customer retention and new business growth. In parallel, the role will also support the Customer Experience team, ensuring all customer queries are answered efficiently and aiming for first contact resolution and positive touchpoints across all interactions.

Whilst operating in the Commercial Sales element of the role, the Commercial & Customer Experience Assistant will assume administrative responsibility for the sales and account management functions of the business. The post will also undertake various types of activity to make a positive contact with all customers and supporting the Regional Account Managers (RAMs) and Head of Commercial to achieve customer retention and new business selling targets. These responsibilities could include but are not limited to updating the relevant system, obtaining contacts, contacting exams teams to discuss their learner registrations and dealing with customer administrative queries.

**Job Responsibilities**

**Commercial Sales Administration Responsibilities:**

1. Log relevant detailed information on to the relevant system in an accurate and timely manner;
2. Maintain all centre contacts on a regular basis ensuring the relevant IT systems are updated;
3. Maintain and build relationships with existing customers; specifically with registrations and exams teams to aid with chasing both registrations and any documentation needed for centre recognitions and qualification approvals
4. Chase missing registrations with customers to update our budget expectations accordingly and to identify any opportunities to upsell
5. Work through registrations on a monthly basis, generating a report showing which registrations have registered early, which are late and which are registering in a different way and sharing this information with the HOC and Financial Controller so the annual income budget can be aligned
6. Assess insight gained from customers and share any information that may lead to a potential selling opportunity to the National Account Executive (NAE), Regional Account Manager (RAM) and/or HOC to follow up
7. Find contacts for NAE, RAM's and HOC, uploading these onto the CRM or alternative system
8. Share new business enquiries with the NAE, relevant RAM or HOC;
9. Work closely with the NAE, RAMs and lead on the centre onboarding and qualification approval process.
10. Process incoming centre recognition and qualification approval documentation, managing the onboarding journey with finance and quality ensuring a smooth and effective onboarding process ensuring the customer is communicated with throughout;
11. Work with Finance and Quality Assurance on Centre Recs and Qual Approvals, chasing any outstanding centre recognition payments and documents with the centre
12. Monitor centre onboarding and customer satisfaction to ensure customers become established with Ascentis procedures before resuming business as usual call cycles with new customers;
13. Process centre withdrawals in an attempt to avoid any unnecessary customer losses, feeding back any issues that can be resolved internally to improve customer experience. Where withdrawal is necessary to liaise with Operations and QA to complete the necessary process;
14. Provide ongoing advice and guidance to our customers on products and services with a view to increasing provision across the current customer base;
15. Where required, work with internal departments such as IT and Finance to ensure effective and efficient support to Customers;
16. Process New Centre Training requests from External Quality Assurers
17. Work with the wider Commercial Team to feedback and improve our customer service levels
18. Work with the Customer Service Advisors (CSAs) to ensure any short-term in bound issues are resolved and can be followed up during call cycle to ensure a holistic customer approach;
19. When making calls chasing registrations, should any upsell opportunities arise, pass these to the relevant RAM or NAE

20. Manage the sales email inbox, ensuring that all leads are assigned to the relevant RAM or NAE
21. Manage the approvals email inbox, ensuring queries are resolved or passed to the relevant team
22. Support RAM's on webinars, looking at questions that come in during the presentation and ensure these are answered and not missed
23. Support the Commercial team with packing for events, such as conferences, and webinars arranged by the Ascentis teams

### **Customer Support Responsibilities:**

1. Provide exceptional customer service to ensure contribution to 95% customer retention target;
2. Serve as the primary point of contact for all incoming customer inquiries across multiple platforms, including email, web chat, phone, and web forms, demonstrating professionalism, empathy, and a proactive, solution-oriented mindset.
3. Take full ownership of escalated inquiries, ensuring resolution at the first point of contact whenever possible. Effectively communicate and collaborate with internal teams to resolve complex issues, providing customers with transparent timelines and regular follow-ups. Manage expectations, mitigate risks, and provide regular reports to department managers regarding ongoing queries.
4. Lead efforts to consistently meet or exceed established SLAs for phone, chat, email, form submissions, cases, and onboarding processes. Proactively identify and address delays to ensure optimal service delivery.
5. Ensure a high standard of customer service by responding promptly to queries, delivering tailored resolutions, and ensuring customer satisfaction in all interactions.
6. Provide advanced support for systems such as Parnassus, Surpass, Moodle, SharePoint, and others. Provide Ad hoc guidance and assistance to customers over phone or email, ensuring a seamless experience and facilitating system adoption. Ensure that any product updates or changes are communicated to relevant external stakeholders.
7. Accurately log and track all customer interactions within the CRM system, ensuring that data is current, complete, and accessible for internal teams.
8. Contribute to the continuous improvement of customer service by documenting processes, reviewing service strategies, and suggesting enhancements based on direct customer feedback and internal observations.

### **Success Measures:**

9. Successful administrative onboarding of new centre approvals, qualification approvals and general administrative tasks within the department
10. Providing the Head of Commercial with registration statistics, such as centres registering learners late or in a different format
11. Achieve delivery standards
12. Adherence to call and meeting cycles
13. Meet individual and contribute towards team service level agreements (SLAs)
14. Positive customer feedback measured through customer surveys, including First Contact Resolution (FCR), Customer Satisfaction (CSAT), and Net Promotor Score (NPS)

### **The following responsibilities apply to all roles:**

15. Contribute as required to regulatory compliance and engage with other processes including business continuity, risk management and the internal audit process;
16. Contribute to the improvement of customer service;
17. Undertake any other responsibilities or tasks that are within the employee's skills and abilities whenever reasonably instructed commensurate to this role.

### **As a member of staff for the Ascentis Group you will be expected to:**

18. Understand and be committed to the Ascentis Group Vision;
19. Work hard and flexibly to achieve your targets and those of the Company and be positive at all times;
20. Actively support a problem-solving culture within your team by seeking to remove any barriers that stand in the way of achieving our targets;
21. Work flexibly to meet the needs of our customers;
22. Implement strategies to achieve continuous improvement in your own performance.

### Status of this Job Description

The above job description is a guide to the work you may be required to undertake but does not form part of your contract of employment and may change from time to time to reflect changing circumstances.

### Accountability

Head of Commercial, Customer Experience Team Leader, Marketing Engagement Manager, Commercial Director, Chief Executive Officer

### Key Contacts

- New and potential customers
- Customer Service Team
- Regional Account Managers
- Head of Commercial
- Financial Controller
- Customer Experience Team Leader
- Marketing Engagement Manager

### Key Attributes (E-Essential, D-Desirable, P-Potential):

1. Excellent verbal and written communication skills (E)
2. Commitment to a high standard of customer service (E)
3. A creative, dynamic and smart approach to sales (E)
4. Positive attitude to change, development and quality (E)
5. Effective team member (E)
6. Be motivated, flexible and willing to go the extra mile (E)
7. Ability to organise and prioritise (E)
8. Competent and experienced in the application and operation of ICT, in particular for database operations (E)
9. Ability to achieve agreed targets and to work to deadlines (E)
10. Experience in a sales and marketing support role (D)
11. Strong problem-solving and conflict resolution skills (E)
12. Experience in using CRM systems (D)
13. Experience in a customer service role (D)

### Agreed:

Post Holder \_\_\_\_\_ Date \_\_\_\_\_