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| JOB TITLE: | BUSINESS RELATIONSHIP EXECUTIVE |
| JOB HOLDER: | |
| DATE UPDATED: | APRIL 2025 |
| REVISION (HR Office Use): | VERSION 2 |

1 MAIN PURPOSE OF THE JOB

The role of Business Relationship Executive focuses on managing and strengthening relationships with Expert Partners, overseeing the benefits and services offered through the company's membership, and supporting business development activities. The role requires a proactive approach to sourcing and managing Expert Partners, creating marketing materials, and supporting the Business Development team to promote membership growth, retention, and engagement. The role will also drive new member acquisition, identify business opportunities, and maintain relationships with current members to increase overall satisfaction and conversion rates.

2 POSITION IN ORGANISATION

- Sits within the Membership Directorate and directly reports to the Associate Director – Acquisition
- This post can be based at Head Office but can equally be home based with responsibility for inbound and outbound activity across the organisation.
- Works closely with other departments particularly the Business Development Team, Hubs, Academy and Sponsorship.

3 DIMENSION & LIMITS OF AUTHORITY

- None

4 SKILLS & EXPERIENCE

- Strong business development and relationship management skills, ideally from a telesales or call center environment.
- Ability to engage with partners and Company Members at all levels, establishing rapport, articulating value propositions, and gaining commitment.
- Organised, detail-oriented, and able to manage competing priorities while working towards financial targets and deadlines.
- Excellent communication skills, both verbal and written, with the confidence to handle a wide variety of stakeholders.
- Familiarity with CRM systems and other web applications, and the ability to work effectively within a remote team.
- Flexibility and a 'can-do' attitude, with a willingness to take on new challenges and expand skills.

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5 DUTIES & KEY RESPONSIBILITIES

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| Expert Partner Management: | 30% |
| <ul style="list-style-type: none"> - Source and introduce new Expert Partners to enhance the company's membership offering. - Work to Expert Partner Sponsor revenue target - Manage all aspects of Expert Partner relationships, including administration, updates, marketing activities, and assets. - Handle the full lifecycle of Expert Partner contracts and agreements, ensuring proper execution and management. - Track and monitor Expert Partner performance, providing monthly reports and updates in the CRM system. - Coordinate and deliver tailored Expert Partner and company member webinars, as well as manage bespoke regional networking activities and round-table events. - Distribute monthly membership newsletters, updating members on benefits and services. | |
| New Member Contact | 20% |
| <ul style="list-style-type: none"> - Providing Act as the first point of contact for new and existing clients across all membership grades, training, and events. - Proactively engage in B2B and B2C activities to promote CIOB membership and services. - Support Business Development Managers by generating leads through phone and email campaigns. - Record and manage client information to support the Acquisition team's sales pipeline. | |
| Business Development and Support | 20% |
| <ul style="list-style-type: none"> - Work closely with Business Development Managers (BDMs) by creating materials and assets to inform members of the company's membership benefits and to support ongoing sales efforts. - Engage in outbound business-to-business (B2B) and business-to-consumer (B2C) activities to promote membership, products, and services. - Assist in identifying new business opportunities and generating leads through targeted email campaigns and telephone outreach. - Support the promotion of CIOB events, such as conferences and networking dinners, and assist in ticket sales for individual events. - Maintain accurate customer data in the CRM, tracking feedback, and identifying cross-sell and upsell opportunities to enhance member retention and satisfaction. - | |
| Member Engagement and Retention: | 20% |
| <ul style="list-style-type: none"> - To generate and manage a pipeline of opportunity; supporting non chartered members and encouraging their path/conversion to chartered status; proactively driving up retention targets; acquiring new members; following up incomplete online applications; following up marketing campaigns. - To provide excellent account management to the smaller CBCs and CONs: identifying cross selling and upselling opportunities, as well as manage the renewals cycle to meet targeted retention rates and revenue targets. - To continuously build, develop, share and maintain in depth product/service knowledge in order to provide a knowledgeable response to clients and so provide an added value service. This will extend to utilising member personas and journeys and employer segmentation, to ensure a personalised approach and a tailored offering that resonates with the member/employer or prospect - To actively seek and record information on clients including feedback, comments on the quality of service and ideas for new products and services. This will include delivering customer satisfaction surveys for benchmarking purposes and to ensure we are constantly improving on our service delivery. To also document frequently asked questions for reference and web publications | |

PART 2: DUTIES & KEY RESPONSIBILITIES

| Internal Collaboration and Process Improvement: | 10% |
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| <ul style="list-style-type: none">- Work collaboratively with internal departments such as the Business Development Team, Hubs, Academy, and Partnerships to achieve organisational KPIs and maintain high service standards.- Participate in the development and testing of new processes, systems, and technologies, offering insights from a client perspective to modernise member engagement.- Contribute to the continuous improvement of internal processes and promote the use of self-service tools where applicable. | |

This is not an exhaustive list of responsibilities involved in the role and the CIOB reserves the right to change the scope of job in line with the operational requirements.

BOTH THE EMPLOYEE AND MANAGER WILL ELECTRONICALLY SIGN THE JOB DESCRIPTION ON PEOPLE HR.