

JOB DESCRIPTION

JOB TITLE:	Sales and insight coordinator
DEPARTMENT:	Customer and marketing
REPORTS TO:	Customer Insight Manager
MANAGES:	N/A
LOCATION:	Housemark office and WFH

Note: This post will involve travel throughout the UK and the post holder will from time to time be required to stay away from home for short periods.

MAIN PURPOSE OF POST

Purpose of the role:

The Sales and Insight Coordinator sits within the Customer and Marketing team and is responsible for the administration and reporting of customer, sales and engagement information for the entire business. You will have good organisational skills and a good knowledge of Microsoft Excel and Word.

This includes managing invoicing and sales processes, maintaining data and reporting within the CRM system, carrying out administrative tasks – such as reformatting documents and preparing reports – as well as cleansing data, checking data quality, and creating customer lists for mailers and internal reports.

Working closely with the Customer Insight Manager, you will be an essential part of a team that provides valuable assistance and insight to all areas of the business. In particular, you will support the administration and reporting of our growing consultancy and wider membership processes, as well as co ordinating senior management appointments and administration

MAIN DUTIES

- Use CRM to run reports, interrogate data and access essential business information to aid customer retention and new business.
- Take ownership for data quality and consistency of information in CRM, supported by the Customer Insight Manager.
- Use CRM and Excel to create regular internal reports that track performance against targets.
- Support the Data Consultancy lead and wider team to track and issue customer proposals, invoices, and payments to associates and suppliers.
- Support the Customer Insight Manager to protect and promote data quality and insight tracking by championing and delivering excellent CRM processes and practices.
- Support the finance system administration for the business by raising, receipting, and approving as appropriate purchase orders, invoices and other via our in-house finance system.

- Support the Customer Experience Officer to book meetings and manage diary appointments and provide administrative support for executive management and senior leadership across the customer and marketing teams.
- Update CRM and other internal databases with accurate information as appropriate. Support colleagues to maintain relevant and important information about customers, the communications and interactions we have with them and capture customer and sector trends and changes.

Corporate responsibilities

- Work collaboratively and communicate effectively at all levels across Housemark, to ensure that all relevant teams are always aware of customer needs and other relevant updates.
- Promote the Housemark brand and model the Housemark values.
- Comply with the company's health and safety policy and procedures and to take reasonable care, to the best of their individual knowledge and ability, to avoid injury to themselves and to others by acts or omissions in their work.
- Undertake any other duties that are consistent with Housemark's expectations for this level of post.

Post holder signature:

Date:

SALES AND INSIGHT COORDINATOR

PERSON SPECIFICATION

QUALIFICATIONS

• Educated to A level, BTEC, HNC standard or similar	Desirable
• Current valid driving licence	Desirable

EXPERIENCE

• Experience of working in a similar role	Desirable
• Proven track record in producing communications material and working with a range of software such as Word, Excel, SharePoint.	Desirable
• Strong experience of using a CRM system (ideally Dynamics)	Desirable
• Confident in working with Excel spreadsheets to manipulate and extract data	Essential
• Confident, professional manner across all interactions with a variety of stakeholders	Essential
• Ability to build successful relationships at all levels	Essential
• Excellent communication, networking and presenting skills at all levels – internally and externally	Essential
• Ability to collate insight and information to create reports, recommendations and solutions	Essential
• Ability to work both as individual and within a team	Essential
• Well-developed time management skills. The ability to prioritise tasks and plan own workloads to ensure deadlines are met.	Essential
• Experience in a social housing environment within the UK	Desirable

COMPETENCIES / capabilities

RELATING TO OTHERS

Persuasive Oral Communication Expresses ideas or facts in a clear, succinct, and persuasive manner. Participates actively and convincingly in conversations, without dominating and by accurately synthesizing others' contributions. Uses active listening skills for the benefit of others, rather than listening simply to extract information or to confirm own ideas.

Written Communication Ability to express ideas clearly in writing, with good grammar, spelling, and punctuation, to a level where documents do not require editing or review by another.

Flexibility Ability to modify own behaviour and adopt a different style or approach in order to reach a goal, manage change, embrace diversity, and resolve conflict.

DELIVERING RESULTS

Personal Organisation for the Team Efficiently establishes an appropriate course of action for self within the larger context of working within the team. Jointly clarifies the purpose with others and works towards accomplishing goals, even when the team is working on something of no direct personal interest.

Driving Success States opinions, seizes opportunities and pursues goals, makes timely decisions, acts ethically, demonstrates accountability for outcomes, and increases overall efficiency and effectiveness.