

Role Title: Customer Retention Executive

Job Level	1b	Job Reference No:	
		Role review date:	
Directorate	Finance and Social Enterprise	Function	
Service	Red Cross Training	Reports to:	Sales Team Leader

Scale and scope of role

Direct reports	0	Indirect reports	0
Budget responsibility/ accountability	£290,000	Accountable for other resources	0

Context

We help anyone, anywhere in the UK and around the world to get the support they need if crisis strikes: connecting human kindness with human crisis.

We enable vulnerable people in the UK and abroad to prepare for and withstand emergencies in their own communities. And when the crisis is over. We help them to recover and move on with their lives.

We are part of the Red Cross and Red Crescent global humanitarian network.

Our Values and Principles

Our values (compassionate, courageous, inclusive and dynamic) underpin everything that we do. As a member of the Red Cross and Red Crescent Movement, the British Red Cross is committed to, and bound by, its **fundamental principles**: humanity, impartiality, neutrality, independence, voluntary service, unity and universality.

Diversity

At the British Red Cross, we are looking for the right people to help us provide support to millions of people affected by crisis. We want our team to reflect the diversity of the communities we serve, offering equal opportunities to everyone regardless of age, disability, gender reassignment, marriage and civil partnerships, pregnancy and maternity, race, religion or belief, sex, or sexual orientation.

Diversity is something we celebrate, and we want you to be able to bring your authentic self to the British Red Cross. We want you to feel that you are in an inclusive environment, and a great position to help us spread the power of kindness.

Purpose of the role

Ensure Red Cross Training remains a market leader in the provision of first aid training; selling courses and products to customers and nurturing relationships to encourage additional Sales.

Key Responsibilities

Sales

- Optimise outbound call and email opportunities by leveraging data-driven insights to personalise communication, enhance customer engagement, and proactively address customer requirements.
- Engage potential customers in meaningful conversations to understand their needs, address any questions or concerns, and provide accurate information about our offerings.
- Meet or exceed individual targets and key performance indicators (KPIs) consistently.
- Meet or exceed monthly revenue targets consistently.
- Manage leads and workflows via a CRM database.
- Work as a member of the sales team; undertaking any other duties within the overall scope of the post.
- Maintain a thorough understanding of our product/service offerings, pricing, and promotional activities to effectively address customer inquiries and objections.
- Build and maintain strong customer relationships.
- Keep accurate and detailed records of customer interactions, sales activities, and transactions in the company's Client Relationship Management (CRM) and Booking systems.
- Collaborate with team members and sales managers to share feedback, insights, and best practices for continuous improvement.

Service Delivery

- Work as an effective problem solver, ensuring any issues are dealt with in a professional manner.
- Deliver a professional service that builds trust with our customers.
- Ensure high standards of customer service through the achievement of call and email quality targets.
- Ensure databases instrumental to the completion of role responsibilities are maintained and up to date.

- Support a variety of administration tasks that ensures customers receive a seamless service.
- Work to key performance indicators.

Team Member

- Actively participate in all team meetings.
- Support other team members.
- Work and behave following all BRC policies and procedures.
- Uphold the fundamental principles of the Red Cross and act with integrity, following the Society’s values (inclusive, compassionate, courageous, and dynamic).
- Develop and maintain colleague relationships via digital platforms to sustain our home and office hybrid way of working.
- Manage adherence to work schedules whilst remaining considerate of colleague requirements.
- Commit to personal training and development plans.

The duties and responsibilities described are not a comprehensive list and additional tasks may be assigned from time to time that are in line with the level of the role.

Pre-engagement checks

Criminal Records

Type of criminal record checks required for this role

England and Wales – Disclosure and Barring Service (DBS)
• None
Scotland
• None
Northern Ireland
• None

Drivers Check - Required –No

Person Specification

Requirements	Evidence obtained through Shortlisting (S), Interview (I), Assessment (A)		
Knowledge and Skills	S	I	A
<p>Essential</p> <ul style="list-style-type: none"> - Excellent verbal communication and interpersonal skills. - Strong persuasive and negotiation abilities to effectively close sales and overcome objections. - Ability to communicate in written and digital mediums. - Proficient computer skills, including experience with productivity software (e.g., Microsoft Office). - Ability to develop strong internal and external relationships, interacting and influencing at all role levels. - Ability to manage workloads and prioritise tasks effectively. <p>Desirable</p> <ul style="list-style-type: none"> - Familiarity with customer relationship management (CRM) systems and sales tools. - Questioning and interpersonal skills. - Strong organisational skills with attention to detail, ensuring accurate record-keeping and follow-up activities. 	<p>S</p> <p>S</p> <p>S</p> <p>S</p> <p>S</p> <p>S</p>	<p>I</p> <p>I</p> <p>I</p>	
Experience	S	I	A
<p>Essential</p> <ul style="list-style-type: none"> - Self-motivated and target-driven, with the ability to work independently and as part of a team. - Experience of working in a target driven environment, ideally within a similar contact centre role. - Utilising computers as an integral part of work. - Collation of information and data, as well as the creation and distribution of management reports. <p>Desirable</p> <ul style="list-style-type: none"> - Results-oriented mindset Self-motivated and target-driven, with experience of achieving targets. 	<p>S</p> <p>S</p> <p>S</p> <p>S</p>	<p>I</p>	

<ul style="list-style-type: none"> - Work in a target-driven environment. - Adaptability to work in a fast-paced, dynamic environment with changing priorities and goals. - Collation of information and data. 		I I I	
Additional requirements			
Essential			
<ul style="list-style-type: none"> - Ensures inclusive practice, challenges discrimination and promotes diversity in line with our Equality, Diversity and Inclusion (EDI) policy. - Upholds the fundamental principles and acts with integrity, in accordance with the Society's values (inclusive, compassionate, courageous and dynamic). - Support corporate strategy, RCT business objectives and KPIs. - Prepared to work additional and unsociable hours (evenings or weekends). 	S S S S		
Values in Action			
<p>Dynamic - We move forward as one team.</p> <ul style="list-style-type: none"> - Every day, we're adapting, innovating and learning. - When the unexpected happens, we are calm, quick and efficient. - We respond smartly, using clear processes and systems. <p>Compassionate - We stand for kindness.</p> <ul style="list-style-type: none"> - People come first, no matter who or where they are. - We have genuine, open-minded conversations. - Together, we're a united force for good. <p>Inclusive - We are open to all.</p> <ul style="list-style-type: none"> - We treat each other with dignity and respect. - Every person's uniqueness is valued, supported and celebrated. - Our individual backgrounds and experiences make our organisation stronger. <p>Courageous - We are bold.</p> <ul style="list-style-type: none"> - We show our strength by doing the right thing. - We aren't scared to test our creative ideas. - As humanitarians, we go the extra mile to help people in crisis 			

We guarantee an interview to disabled candidates (as defined in the 2010 Equality Act), who meet the minimum shortlisting criteria in the advertised person specification and apply under the disability confident scheme.