

Short, Medium and Long Term Deliverables

3-Month Deliverables

1. Client Onboarding and Relationship Building

- Successfully onboard all current clients in the assigned territory, ensuring they are introduced to the Account Manager and understand the role as their primary point of contact.
- Conduct initial meetings with key clients to discuss their goals, service needs, and expectations, documenting insights to tailor future support.

2. Team Integration and Process Familiarisation

- Establish collaborative working relationships with the two administrators, defining clear expectations for bid-writing and administrative support tasks.
- Become proficient in the organisation's CRM system, setting up tracking processes for leads, client interactions, and progress toward targets.

3. Sales and New Business Pipeline Development

- Identify 3–5 potential new client prospects in the region and begin initial outreach to introduce the organisation's services.
 - Attend at least one industry event or networking opportunity to represent the organisation and build connections.
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6-Month Deliverables

1. Account Growth and Client Satisfaction

- Lead review meetings with all key clients, gathering feedback on services provided and identifying areas for expansion or improvement.
- Establish a quarterly client feedback survey to assess satisfaction and make data-driven improvements to the client experience.

2. Team Management and Performance Optimisation

- Develop a streamlined process with administrators for preparing bid submissions and managing tender responses, with a 100% on-time submission rate.
- Introduce a weekly or bi-weekly reporting structure with administrators to ensure bid, project, and administrative tasks are aligned with client goals and deadlines.

3. New Business Wins and Strategic Partnerships

- Secure at least two new client partnerships and prepare tailored onboarding plans to ensure smooth integration.
- Collaborate with the Finance Director (interim Partnerships Director) to refine client retention and expansion strategies, implementing new tactics to drive partnership growth.

Equal

Education

12-Month Deliverables

1. Revenue Growth and Client Retention

- Achieve a defined revenue target from new client acquisitions and expanded services for existing clients.
- Implement a client retention plan that achieves a 90% renewal rate for all key clients in the portfolio.

2. Enhanced Service Offering and Bid Management

- Work with administrators to increase the success rate of submitted bids by 20%, ensuring bids are aligned closely with client needs and organisational goals.
- Collaborate with Senior Leaders to assess and potentially expand service offerings based on client feedback and market trends.

3. Team Development and Process Improvement

- Conduct performance reviews with administrators, setting goals for the coming year and identifying areas for professional development.
- Propose and implement at least one new process improvement to streamline client management, reporting, or bid preparation, enhancing efficiency and effectiveness across the team.