

Job Description & Person Specification

Job title:	Transformation Coach
Salary:	£21,282 to £28,612 per annum pro rata
Team:	Practice Unbound
Accountable to:	Customer Success Manager
Location:	Here, 4th Floor, 177 Preston Road, Brighton + working from home

Job Purpose

Practice Unbound (PU) is the growing subscription business and innovation unit of Here, delivering blended learning products for practitioners internationally.

The purpose of this role is to support users to implement our products with the aim of creating loyal and repeat customers. You will have a role to play in the retention of users under subscription, and the upselling of users into subscription, as well as supporting the sales team to cross sell products to existing customers.

You will do this by tracking customer implementation from sale to end of contract and by delivering outstanding customer service through the Practice Unbound helpdesk (open Mon – Fri 9am – 5pm GMT), via phone, email and video call. The role holder will deliver onboarding, refresher training and workshops, via video call (and potentially face-to-face post COVID – 19 pandemic).

As someone who works directly with users, you will input into product development and the overall development and growth of the Practice Unbound business.

Job Specification

Customer onboarding, delivery and retention

- Provide support (via email, phone and video call) to customers internationally supporting them to implement our products.
- You will host our Practice Unbound helpdesk (Mon – Fri 9am – 5pm GMT) and deliver outstanding customer service, technical and implementation support to our users, ensuring issues are resolved in a timely manner and within agreed processes.
- You will host onboarding sessions, training and workshops for users virtually (and in the future, face to face) to ensure a good start to their product implementation journey.
- You will use data analysis to track and oversee delivery from point of sale through to end of contract

- Create data and narrative reports for specific customers to support implementation or sales
- Retain customers in subscription by understanding, collating, and delivering what matters
- Upsell subscription to existing customers and support the sales team to cross sell new products to existing customers

Systems & Data

- You will become an expert in how our delivery systems work together and support others to use them well
- You will ensure that records on customers are kept up to date in our Customer Relationship Management tool (CRM), product Platform and supporting systems in line with current processes.
- You will support and encourage a learning environment within our team and with Customers, identifying, logging, investigating and resolving incidents and complaints
- Create reports for key meetings

Product Development

- You will contribute to the development of Practice Unbound products by gathering data to identify improvements
- You will support the Customer Success Manager to create and deliver product upgrade specifications that meet the needs of our customers and encourage retention year on year
- You will act as a Subject Matter Expert (SME) for clinical system elements of products and work closely with CSI to ensure you understand how these operate and can explain this clearly to customers, as well as inputting into development specs and testing as required

Key Relationships

- Our customers and users (individual practitioners, practices, PCNs and clusters, CCGs and health boards, ICS / STP, other healthcare organisations)
- Other Transformation Coaches
- Customer Success Manager
- Sales Executives
- CSI Team (team of systems, data and developer expertise)

Person Specification

- You will be educated to degree level or have acquired the equivalent through experience, preferably acquired in the health and social care sector
- Proven track record of working in a customer facing role

- You will have experience of hosting workshops or training sessions, either face to face or virtually, and using coaching methods
- Technically confident with systems and data (experience in PowerBI and Microsoft Dynamics desirable)
- Ability to use, analyse and summarise complex technical data and share this in a simple way, particularly to those who aren't technically confident
- Excellent communication and interpersonal skills
- Flexible approach, able to operate effectively with uncertainty and change
- Driven, self-motivated, enthusiastic and with a "can do" attitude
- You will have a good knowledge of Microsoft Excel (and MS office) and will be able to use it to analyse, forecast and present results
- Ability to spot sales opportunities and engage customers in new products in a way that matches what matters to them
- You will have held a role that required excellent organisational skills, and high attention to detail, and the ability to work on your own initiative and as part of a team.
- You will, ideally, have had experience working with a GP clinical system in the operational running of a General Practice
- You will have the ability and experience in offering outstanding customer service at all times.
- You must be able to travel as part of this role (this will be based on future circumstances surround COVID-19).

About us and our culture

We are a not-for profit, social enterprise, membership organisation delivering NHS services. Our members are local GPs, practice managers, practice nurses and our own staff.

We believe these things to be true

- Care is something we can choose to show for ourselves and each other at any time. Care is not exclusive to an appointment or a medical intervention
- We have a right to take control of our lives
- It takes courage to step forward and effect change. The capacity to lead is within us all
- Every interaction can be powerful if we choose to engage consciously. We know the ripples from these movements can go on to create profoundly positive change
- True care is a way of living that creates meaning between us all

Our Purpose in the World

Care Unbound. To create more possibilities for care in every moment.

How we work in service of our purpose

- We strengthen our capacity to care for ourselves and each other

- We recognise each opportunity to help people make meaningful choices
- We encourage ourselves to be guided by our values in the work we do every day
- We develop the capacity for leadership in ourselves and with all those we engage with
- We make improvements quickly where we recognise the opportunity, rather than waiting for perfect solutions
- We bring together the right people organisations and ways of working to create true partnerships

We believe in enabling people to take control of their health care journeys – we help to change the way health and wellbeing services work so care can focus on what matters to individuals.

We work to ensure that our culture is one that allows everyone to come to work as their ‘whole’ selves. For most of us, work takes up a big part of our day. We want to ensure that it’s enjoyable and speaks to us on a level deeper than ‘just getting the job done’.

Because of this:

- We run a coaching programme which enables everyone to learn how to become a coach and have access to coaching when needed
- We have a process called ‘Pirate Dave’ which allows peer-to-peer conversations about development
- We have a staff-run ‘Wellness Group’ that enable staff to set up initiatives that link to wellness/wholeness. This has included running yoga, installing a ping pong table in the rec room and buying free fruit for staff
- We have a staff-run ‘Time & Spaces Group’ who run organisational wide projects to ensure that every voice from the organisation is heard. They have been a big part of our recent office refurbishment which included installing a quiet room covered in grass for when we need to take a break and running an artwork competition so we can cover our walls with art created by our staff.
- We host mindfulness sessions twice per day

USE OF NEW TECHNOLOGY

We will make use of computer technology. Staff should expect to use automated information systems in their work in order to improve quality and co-ordination of services, and to enable faster and more accurate communication within and outside of the organisation.

CONFIDENTIALITY

As an employee of ‘Here’ you may gain knowledge of a highly confidential nature relating to the private affairs, diagnosis and treatment of patients, information

affecting members of the public, matters concerning staff and details of items under consideration by 'Here'. Under no circumstances should such information be divulged or passed to any unauthorized person. This includes holding conversations with colleagues concerning patients or staff in situations where the conversation may be overheard. Breaches of confidence will result in disciplinary action which may involve dismissal.

EQUAL OPPORTUNITIES

Our policies and practices are designed to ensure equality of opportunity in employment and service delivery. All staff are expected to comply with these policies and practices.

HEALTH AND SAFETY

All staff have a responsibility to perform their duties in such a way that accidents to themselves and to others are avoided, and to cooperate in maintaining their place of work in a tidy and safe condition, thereby minimising risk. Employees will, therefore, refer any matters of concern through their respective line managers. Similarly, it is each person's responsibility to ensure a secure environment and bring any breaches of security to the attention of their managers.

NO SMOKING POLICY

We operate a no-smoking policy. This applies to all staff and visitors. This policy also includes travelling in 'Here' owned or leased vehicles during work time and whilst travelling in their own vehicles whilst on duty, in work time or whilst on 'Here' premises. It is a condition of employment for staff that they do not smoke whilst on duty or anywhere on the premises including the car park.

TRAINING AND DEVELOPMENT

All employees have a responsibility to undertake statutory and mandatory training that is required by 'Here'. In accordance with the Training and Development Policy staff are expected to actively participate in the appraisal system and using this process to develop a Personal Development Plan (PDP).

AGREEMENT

This job description will be reviewed as necessary and may be amended to meet the changing needs of 'Here'. It will also be used as the basis to set performance standards and/or objectives and the contents will be used as part of annual appraisals. This job description has been agreed between the post holder and 'Here'.

Employees

Signature:

Print Name

Date:

Manager Signature:

Print Name:

Date:

JD author (name and job title):	
Date JD agreed:	
Brief description of reason for review (if applicable)	
Version number	