

**PERMANENT PART TIME, CLIENT CARE AND DATA EXECUTIVE, BH21  
REF: E3CDE2022**

**Salary offered is £30,000 to £35,000 Gross per annum, pro rata (£15.38 – £17.95/hr)**

(This is a hybrid work opportunity, therefore location within a commutable distance of BH21, Dorset is essential for this role).

We are excited to be working with E<sup>3</sup> Consulting (a professional services firm) with recruiting a Client Care and Data Executive.

E<sup>3</sup> Consulting is an award-winning property taxation specialist, working with property developers, owners, investors and occupiers across the UK. E<sup>3</sup>'s services include: Capital Allowances, Community Infrastructure Levy (CIL), Land Remediation Tax Relief, Repairs & Maintenance and VAT.

This is a part-time permanent position working a minimum of 15 hours up to 21.5 hours per week. There is scope for this Client Care and Data role to develop and hours to increase depending on the requirements of the business, and so flexibility on working hours and/or job sharing may be required. The successful applicant must be prepared to travel to the office or agreed location for internal meetings, training, and other key business activities – at agreed times where these may fall outside of the general hybrid working structure. All applicants must be eligible to work in the UK without sponsorship.

This is an environment where attention to detail is key, and a natural desire to learn, understand and constantly improve is essential. If you are looking for a Client Care and Data role, where you are an integral member of an SME business team, your ideas and opinions are actively encouraged and valued, whilst having a focus on collaborative long-term relationships, independence of mind, quality in all you do - this could be the role for you.

**Main duties will include: -**

- Point of contact for sales enquiries into the business, both by telephone, website and email
- Ensuring all clients receive a personalised service, ensuring they feel supported as a client of E<sup>3</sup> Consulting
- Setting up, onboarding and providing bespoke support to new clients
- Building and maintaining professional relationships with clients, encouraging a 'first point of contact' relationship
- Aiding and improving internal and external communications
- Administration lead on all activities relating to CRM – ideally with experience of Microsoft Dynamics
- Support and assist with the development of data and CRM strategy and action plan
- Data management, monitoring and evaluation
- Build and raise the quality of data within the database
- Develop clear and user-friendly reporting techniques
- Support the improvement of policies, procedures, templates and checklists
- Support with CRM marketing and sales automation and integration
- 'Housekeeping' to maintain a clean and user-friendly CRM



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- Provide support and training to new and existing colleagues for CRM updates and changes and be a focal point for supporting relationships with Suppliers
- Actively support with weekly and monthly meetings, creating agendas and relevant documentation regarding Microsoft CRM Dynamics and associated reporting, and follow up
- Reporting to the Directors regarding market trends in our key sectors, including quantitative and qualitative analysis
- Working to deadlines in a professional and timely manner
- Providing operational project support to Directors and the wider team

**The successful applicant will: -**

- Be keen to continue their career in a Client Care, Operations and Data environment
- Have knowledge and experience of relationship databases, ideally Microsoft CRM Dynamics
- Have an Executive Assistant, Client Care, Analysis or Graduate background (any discipline) with research experience gained within a sales, marketing, or other business-related environment.
- Be confident and comfortable using different mediums (including the use of websites, blogs, business pages, local sources and social media) to research and investigate organisations and relevant information
- Be passionate about analysis of data, identifying trends and abnormalities where appropriate
- Have experience of working within a small business or actively looking to work as part of an SME team and understanding the role played as part of a small business
- Be confident working with figures and spreadsheets
- Be process driven, with the ability to follow a brief/plan meticulously
- Have an active and curious mind
- Have research experience, including quantitative and qualitative analysis of information
- Be confident with Microsoft packages (Word, Excel, PowerPoint, etc) and ideally CRM software such as Microsoft Dynamics, also Photoshop / Canva, although not essential
- Have excellent communication skills (both verbal and written), including a friendly and professional telephone manner
- Have strong communication skills (both verbal and written)
- Exceptional attention to detail
- Have considered and informed opinions based on analysis of information and be confident to communicate these in a considered manner to other members of the team
- Have a 'can-do' attitude, be flexible and wish to integrate within a small proactive team
- Be self-motivated and organised

Please include a covering letter outlining your current/most recent role, details of any research or analysis work completed within a business environment, and your motivation to want to work as a Client Care and Data Executive within a small business environment.

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