



**The
Workforce
Development
Trust**

Client Analyst

Job description

Job Title	Client Analyst
Department	Consultancy and Research
Reports to	Bristol Office or with clients, with the flexibility to work from home 50%
Location	£35 - £40k
Pay Scale	Permanent
Contract	Full time
Hours	Full time 37.5 hours per week

The Workforce Development Trust

The Workforce Development Trust is a not-for-profit organisation that provides services that support employers to develop skilled, sustainable, and efficient workforces in the UK and abroad. We operate via our collective of four brands; Skills for Health, Skills for Justice, SFJ Awards and People 1st International, which deliver specialist, targeted skills interventions to support a variety of frontline public services.

Job summary

The Client Analyst will contribute to revenue growth and customer engagement for the Workforce Development Trust (WDT) across its Consultancy and Research portfolio.

Reporting to a Client Director, this position will work within the Business Development team supporting with client analytical requirements. The role will support with growing the Skills for Justice and Skills for Health presence and customer base and deliver key business development functions. The role will enhance Skills for Health and Skills for Justice's understanding of the Health and Justice sectors, including the current and prospective client base, ensuring services and products are aligned to meet their needs.

Key responsibilities

To be successful, the Client Analyst must be able to support the Business Development team using analytical skills, generating insights and progressing account management tasks promptly, to a high standard. The Client Analyst must be able to assimilate complex information and report upwards effectively. The successful candidate will require excellent communication, analytical and problem-solving skills. The role requires initiative, motivation and attention to detail.

Core responsibilities will include:

- **Account management** - assisting with the management of commercial procurement processes, including managing progression of payments, co-ordinating and managing contracts and payment schedules, obtaining purchase orders.
- **Client communication** - following up on early contact website enquiries and lead generation (pre-contract / award qualification).
- **Data analysis** - researching and developing data/insights with regards to client accounts, territories and/or opportunities. This will include maintaining up to date key client information on CRM and Salesforce systems. Utilise analytical skills to help delivery teams, providing capacity and capability as required.
- **Problem solving** - using problem solving / data analysis techniques (such as drawing inferences, building dashboards, analysing trends) to help inform solution designs, including project plans.
- **Product evolution** - identifying new product/development areas using research and data, providing innovation based on data / insight to assist in project planning & product development
- **Introduce new opportunities and solutions** - to improve sales efficiency while collaborating internally with cross functional teams. This could include capturing lead generation and account management information and/or developing process to automatically respond and schedule client meetings.
- **Content development** - supporting competitive tender submissions / proposals with data, insights, intelligence and/or research.
- **Marketing / Customer Intelligence** - contributing to gathering, developing and the delivery of marketing activity / customer intelligence, including supporting development of case studies and impact reports.
- **Business support** - managing accounts and providing ad-hoc project management assistance on key projects. On successful tenders, provide support to the implementation team at project initiation stage, developing templates / resources and supporting delivery as required.
- **Reporting** - developing high quality, executive level report to demonstrate Business Development trends / patterns / impacts / other metric areas of

interest, including on emerging markets and market shifts while being fully aware of new products / services from market competitors. to assist in project planning & product development. Develop accurate pipeline, sales, and revenue reports and a forecast for key stakeholders across the WDT group.

- **Build and promote data/information banks** - that deliver client insights, including their previous / existing relationship history with Skills for Health / Skills for Justice.
- **Develop, manage, and maintain effective working relationships** - with external stakeholders and internal colleagues, including providing advice, guidance, and content development / technical input on bids, proposals and projects
- **Embed and ensure a complete focus on a “high value” approach** - ensuring that communications, proposals, products and interactions are of the highest quality with a view of exceeding client expectations, embedding our reputation as a trusted supplier, delivery partner and consultancy.

Person specification

Criteria	Essential	Desirable
Education and qualifications		
Degree and/or analytical qualification or equivalent demonstrable data/analytical knowledge and experience		X
Evidence of continuing ongoing professional development.	X	
MSP / PRINCE2 / AGILE		X
Knowledge		
Strong knowledge and understanding of workforce development issues faced by employers within the health and/or justice sectors		X
Strong knowledge of public sector commissioning processes		x
Current knowledge of skills development policies as these relate to the health and/or justice sectors		X
Knowledge and understanding of standing financial instructions in the preparation of bids and proposals		X
Understanding of the commercial requirements of a business and how these translate into business development	X	
Experiences		
Experience of data analytical, research, insights generation, ideally from a client focused/customer service driven environment.	X	
Experience of successfully implementing continual improvement processes		X

Experience of programme delivery		X
Experience of presenting insights, data, and research to senior leaders	X	
Experience of delivering tender response proposals and the creation and delivery of presentation materials at panels or other selection formats		X
Experience of developing and delivering against short and medium-long-term business development plans		X
Experience of business development and delivery within the Public Sector		X
Experience of handling complex business/ commercial and 'in confidence'/sensitive information both internally and externally		X
Experience in the development, delivery and management of consultancy/research/quality assurance services	X	
Skills and abilities		
Excellent communication and presentation skills with the ability to articulate a clear vision and present appropriate and well-structured arguments	X	
Well-developed analytical, organisation and reporting skills	X	
Well-developed research skills, ability to navigate open source and social media information to develop key insights		X
Ability to synthesise innovative solutions and ideas to address potential business opportunities.		X
Well-developed team working skills.	X	
Ability to work autonomously and proactively to deliver an agreed plan of action	X	
Advanced digital capabilities utilising MS Offices suite (inc PowerBI)	X	
Other		
Able to undertake extensive travel across the geographical area and to be mobile across the UK	X	
Track record of contributing to business development success	X	

Job Description Completion

Name	M. Girdlestone
Job title	Principal Client Director
Department	C&R
Date	21 st Oct 2024

All job descriptions are subject to review. All post holders are expected to be flexible and prepared to carry out any similar or related duties that do not fall within the work outlined. The line manager, in consultation with the post holder will undertake any review.

Safeguarding

The Workforce Development Trust Ltd are committed to safeguarding and promoting the welfare of children, young people and vulnerable adults and expect all employees to share this commitment.

Equal Opportunities

The Workforce Development Trust Ltd are committed to eliminating unlawful discrimination and promoting equality of opportunity. Every employee has a personal responsibility to:

- Ensure their behaviour is not discriminatory.
- Does not cause offence.
- To challenge the inappropriate behaviours of others.
- Adhere to the Equal Opportunities policy.

Health and Safety

Under the provisions contained in the Health and Safety at Work Act (1974), it is the duty of every employer to:

- Take reasonable care of themselves and for others at work.
- To co-operate with The Workforce Development Trust Ltd as far as is necessary to enable them to carry out their legal duty.
- Not to intentionally or recklessly interfere with anything provided, including personal protective equipment for Health and Safety or welfare at work.

The Workforce Development Trust Ltd will take all reasonable practical steps to ensure your health, safety, and welfare whilst at work. If employed, you must familiarise yourself with the Health and Safety policy and Fire Safety rules. It will be your legal duty to take care of your own health as well as that of your colleagues.

Confidentiality

Within this role there will be a need to use or be party to confidential information. The employee may not disclose any information of a confidential nature relating to The Workforce Development Trust Ltd or in respect of which The Workforce Development Trust Ltd has an obligation of confidence to any third party other than where you are obliged to disclose such information in the proper course of your employment or required by law.

The unauthorised use or disclosure of personal information no matter whether in verbal, written, or electronic format, or through negligence, is regarded as misconduct. Employees are expected to act with integrity both inside and outside the workplace.

Data Protection

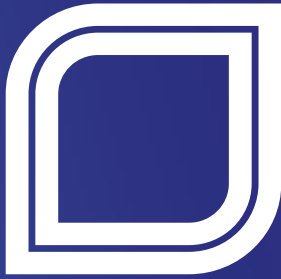
If you apply for a position with the Workforce Development Trust, we will use the information you provide to assist in the recruitment and selection process. Under GDPR, the general information that you supply about yourself is known as your personal data and information about any criminal convictions, ethnic origin, and health, amongst other things, is referred to as 'sensitive personal data'.

The Workforce Development Trust takes the security of your data seriously, and will not share your data with third parties, unless your application for employment is successful and it makes you an offer of employment. The Workforce Development Trust will then share your data with former employers to obtain references for you, employment background check providers to obtain necessary background checks and, where necessary, the Disclosure and Barring Service to obtain necessary criminal records checks. The Company has a legitimate interest in processing personal data during the recruitment process and for keeping records of the process. Processing data from job applicants allows the Workforce Development Trust to manage the recruitment process, assess and confirm a candidate's suitability for employment and decide to whom to offer a job. The Workforce Development Trust may also need to process data from job applicants to respond to and defend against legal claims.

Your information may be shared internally for the purposes of the recruitment exercise. This includes members of the HR team, interviewers involved in the recruitment process, managers in the business area with a vacancy and IT staff if access to the data is deemed necessary. We will hold details of all applicants until the post applied for is filled. After which, if the candidate is unsuccessful, all documents held will be confidentially disposed of, both electronically and physically. Data will not be held for any longer 3 months of receiving an application. At the end of that period, your data will be deleted or destroyed. If you wish for your data to be destroyed before this period, you may contact the HR department and request for your data to be deleted. If your application for employment is successful, personal data gathered during the recruitment process will be transferred to your personnel file and retained during your employment.

Other Employment

You may not without prior permission in writing of The Workforce Development Trust Ltd, be employed or otherwise engaged in any other business, trade, or profession, either directly or indirectly in any capacity whatsoever.



The Workforce Development Trust

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Skills for
Health

Skills for
Justice


SFJ
Awards

People **1st**
International