

## POSITION DESCRIPTION

<b>Position Title: Customer Success Lead</b>	<b>Direct Manager: Head of Operations</b>	
<b>Budget Responsibility:</b>	<b>Direct Reports: 4</b>	<b>Indirect Reports:</b>

### WHAT YOU'RE HERE TO ACHIEVE

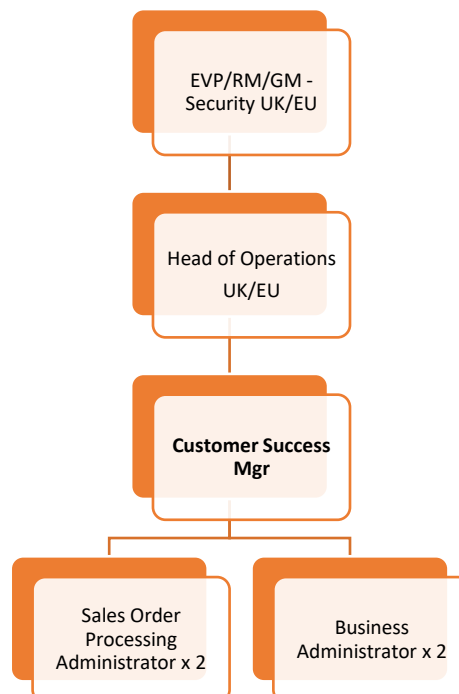
The Customer Success Manger is responsible for managing the supply of Security products from Gallagher to our customers and ensuring that orders, quotes and enquiries are transacted efficiently and consistently with timely communication to all stakeholders throughout the process, whilst ensuring exceptional levels of customer service throughout.

Continual review and refinement of procedures and processes and their application is a core element of this position to ensure low touch best practices are being adopted.

Oversee the Business Administration team in support functions, incl Channel Partner Onboarding, RGA's and Order support services. Have a strong understanding of the importance of ISO and Continual Improvement activities.

This is a key role which liaises with various internal and external parties to ensure product is available and appropriate transportation arrangements are made including any international border requirements for our European based customers.

### WHERE YOU'LL FIT IN #TEAMGALLAGHER



### WHO YOU'LL BE WORKING WITH

INTERNAL RELATIONSHIPS	EXTERNAL RELATIONSHIPS
Security Leadership Teams Security Operations Teams Security Sales Teams Marketing Gallagher Support Services (ie Finance, Legal, P&B)	Vendors Channel Partners End Users

## WHAT YOU'LL BE DOING

Key Accountability	Outcomes/ Expectations
<b>Sales order management:</b> <i>Develop and implement systematic process of receiving, processing, and fulfilling customer orders is implemented to ensure efficient and accurate delivery of products or services</i>	<ul style="list-style-type: none"> <li>• Develop and implement Sales Order Management (SOM) processes that are efficient, effective and are carried out accurately within the timeliness expectations of Gallagher Security customers.</li> <li>• Manage escalated SOM related issues that are unable to be resolved by the Sales Order Processing Administrators or have a larger impact on processes and systems.</li> <li>• When required, in times of high demand, process Purchase Orders into Sales Orders to assist the Sales Order Processing Team members workloads.</li> <li>• Drive consistency of processes and service levels across subsidiary SOM functions.</li> <li>• Lead a customer focused approach to drive positive feedback from channel partners and internal teams.</li> <li>• Develop and maintain working knowledge on SOM account management tasks to effectively back up if/when required to provide support in times of staff absence.</li> </ul>
<b>Service and Delivery Management:</b> <i>Oversee the planning, execution, and optimisation of services and product delivery processes to meet customer expectations and achieve operational efficiency</i>	<ul style="list-style-type: none"> <li>• Engage with freight forwarders ensuring service levels are met, &amp; support export border documentation when required.</li> <li>• Work with in market sales teams on quotes and order requirements</li> <li>• Resource Software Maintenance transactional requirements to ensure all processes are completed correctly at the right time.</li> <li>• Work with regional Operation Manager to ensure subsidiary warehouses have appropriate levels of stock.</li> <li>• Raising of IC Freight Orders</li> </ul>
<b>Business Administration</b>	<ul style="list-style-type: none"> <li>• Support ISO 9001 processes and administration and Internal Go beyond assessments.</li> <li>• Oversee Channel Partner Onboarding and account creation</li> <li>• Work with business administrators to support RGA processes, and manage any escalation requirements.</li> </ul>

<p><b>Reporting:</b> <i>Implement and maintain a streamlined reporting process to ensure timely and accurate dissemination of key performance metrics</i></p>	<ul style="list-style-type: none"> <li>• Ensure month end activities are completed within the required timeframes, including identification, reporting and processing of outstanding orders.</li> <li>• Regularly update the Open Order dashboard to ensure that orders are being processed correctly and in a timely manner.</li> <li>• Continuously review, analyse and deliver data and insights to enable effective decision making</li> </ul>
<p><b>Continuous Improvement:</b> <i>Demonstrate a commitment to staying up to date with trends and developments that could improve business processes</i></p>	<ul style="list-style-type: none"> <li>• Be proactive in developing and continuously improving knowledge and skills.</li> <li>• Take responsibility for your own learning and development through a process of assessment, reflection, and action.</li> <li>• Utilise existing networks to collaborate and enhance thinking.</li> </ul>
<p><b>Leading People:</b> <i>Lead the team so members are highly engaged, passionate about the work they do, and empowered to achieve the best outcome for key stakeholders</i></p>	<ul style="list-style-type: none"> <li>• Set clear expectations and goals / KPIs with an alignment to group strategy.</li> <li>• Provide regular, constructive feedback on delivering to expectations.</li> <li>• Hold yourself and others accountable for performance delivery and behavior aligned with values.</li> <li>• Seek support, coaching, and guidance to support your leadership journey and to create a positive people experience.</li> <li>• Address issues early and escalate to Manager and / or People Business Partner as needed.</li> <li>• Welcome feedback from others and invest in yourself so you can be the best you can be.</li> <li>• Support organisational development initiatives that motivate, engage, grow and retain the team e.g. upskilling/ training, high potential growth opportunities, cross-functional work opportunities, recognition and reward programmes etc .</li> <li>• Develop a strong relationship with People Business Partner / Advisor to adopt a collaborative approach to optimising people opportunities and addressing people challenges.</li> </ul>
<p><b>Leadership contribution:</b> <i>Collaborate and engage effectively as a united front, and exemplify day to day what the Gallagher culture means</i></p>	<ul style="list-style-type: none"> <li>• Actively participate as a member of the Security Operations Leadership Team by challenging thinking, seeking feedback, and contributing to discussions</li> <li>• Share knowledge freely</li> <li>• Role model, communicate &amp; highlight our purpose, values and behaviours at every opportunity</li> <li>• Respect the diversity in our teams and all voices are heard through honest, respectful communication and consistency</li> <li>• Demonstrate a united front and support other leadership team members' individual development goals</li> <li>• Drive effective communication and collaboration across regions to drive effective outcomes quicker</li> </ul>

Including any other duties not specified that may be required to complete the role, and as requested by the Reporting Manager.

## HOW YOU'LL BE DOING IT

### **Qualifications, Skills and Experience:**

- Thorough understanding of international sales transactional and border processing requirements
- In depth use of transactional computer system for international sales transactions – SAP desirable
- Excellent communication skills, both verbal and written.
- Detail-oriented with a high level of accuracy in documentation.
- Ability to work both independently and as part of a cross-functional team.
- Strong Excel and PowerPoint skills.
- European 2<sup>nd</sup> language desirable

### **Behavioural Competencies:**

- Forward thinking, operating one step ahead to anticipate opportunities and challenges.
- Welcomes feedback from others and adopts a reflective practice to identify and develop areas requiring growth.
- Works collaboratively to enhance team spirit and overall team output, sharing knowledge and experience to help develop the team.
- Structured and well organised, with the ability to work multiple things at a time employing good time management and prioritisation skills to ensure delivery.
- Passion for continuous improvement and bringing people together on a journey.
- Strong attention to detail and commitment to data accuracy.

# Protect what matters most.

Our purpose and our values apply to our extended Gallagher family including our employees, customers, partners and community.

