



**Saïd Business School**  
**University of Oxford**  
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[www.sbs.oxford.edu](http://www.sbs.oxford.edu)

<b>Job title</b>	Client Engagement Manager
<b>Division</b>	Social Sciences
<b>Department</b>	Oxford Saïd Business School Ltd
<b>Location</b>	Egrov Park, Kennington and Park End Street, Oxford
<b>Grade and salary</b>	Grade 7: 32,817 - £40,322 (with a discretionary range to £44,045) p.a.
<b>Hours</b>	Full time
<b>Contract type</b>	Permanent
<b>Reporting to</b>	Senior Client Engagement Manager, Custom Executive Education

### The role

The Client Engagement Manager will report to the Senior Client Engagement Manager.

Engagement Managers hold the key responsibility of the project management to delivery of Custom Executive Education within the School. Custom Executive Education is tailored executive development that deploys the School's expertise in business and learning processes to help clients achieve their corporate objectives.

Engagement managers play a key role in building and maintaining client relationships at an operational level, with support from the Client Directors.

The Post-holders will effectively be 'relationship managers', responsible for a portfolio of custom clients and for leading project teams - managing the effective operational planning to delivery of their client engagements - resulting in positive and enriched client relationships where expectations are exceeded, side-by-side with achieving agreed profit levels for the School.

Engagement managers are specifically responsible for leading their project teams and managing and coordinating planning to delivery for all their clients' engagements. This includes: creation and management of the project plan, planning key stakeholder meetings, management oversight of all logistics, implementation, management and tracking of all budgets and oversight of programme delivery planning. They will ensure that contracts are in place with their clients and raise Purchase Orders/Work Orders against agreed budgets; they will take primary responsibility for ensuring expenditure is within budget and that the School's interests are protected. They will work with the Programme Directors to grow the client accounts to ensure multi-year programmes are contracted and delivered.

Every programme is subjected to formal evaluation by the individual participants and the client organisation. Client satisfaction is a crucial element in the published rankings on which the School's reputation depends and is a top priority for the post holder.

## **Key Interfaces**

In this role you will engage with:

- Clients
- Client Directors
- Programme Directors
- Faculty
- Associate Fellows/Consultants
- Custom Executive Education team members
- Programme Services team members
- Internal Bookings and other operational teams including IT/AV, Catering, Finance etc.
- External providers including Hotels, Venues etc.

## **Key Responsibilities**

### *Strategy Execution*

- The engagement manager will contribute to the planning and execution of:
  - Custom Executive Education Business plan;
  - Cluster Business plan
  - Client Account plans

### *Specialisation*

- Engagement managers will be expected to develop expertise in nominated industries and delivery channels for custom executive education.

### *Sales and market development*

- The engagement manager will be expected to:
  - Proactively gain awareness of custom executive opportunities through client and market contacts harnessing soft intelligence and sharing this with the relevant client director and client account team
  - Progressively extend their internal and external network through professional networking activity

### *Relationship Management*

The Engagement Manager will have a clear understanding of their clients' objectives and goals, having sound financial, contractual and organisational client knowledge in order to best support each client within their portfolio. They will make sound commercial decisions and resolve issues as they arise, utilising the expertise of the Commercial & Operations Director, Associate Director Bid Management & Commercial Performance, Senior Client Engagement Manager and Client Directors.

The Engagement Manager will:

- Be a member of a Business Development & Delivery Cluster within the Custom Executive Education team
- Develop peer to peer relationships with client personnel and act as a trusted advisor to client contacts
- Have overall operational responsibility for a portfolio of clients. The number of clients in their portfolio will be dependent on size of the client business, complexity of project, volume of deliveries etc. The post holder will work on a number of concurrent projects, each with its own project plan, outputs and project team members
- Lead each of their project teams. The engagement manager will take the operational ownership and lead from the design and development phase, to create and progress the engagement 'red thread' and timetable
- Create and manage the project plan and all supporting documentation, using internal standard documentation – including producing regular status reports and meeting minutes/notes for all internal and client related activities for each project team
- Meet and liaise with representatives from the client organisation, ensuring a clear understanding of the client's objectives as well as engagement delivery requirements is communicated effectively to all relevant parties and that the client objectives are considered in all relevant aspects of engagement planning to delivery. There will be a requirement to explain complex and detailed specialist/tailored information to internal and/or external stakeholders in order to finalise/agree programme learning content or operational plans
- Act as the lead for each of the engagements under their portfolio, ensuring that project plans are compiled communicated and understood and that all deadlines are adhered to – engaging all relevant parties. This will require regularly reviewing the progress of the project, through stage gating
- Take the lead in the booking of internal and external venues; negotiating with suppliers, visiting venues to ensure facilities are suitable to meet both client and programme delivery requirements
- Manage and oversee arrangements for the delivery of engagements in their portfolio - be they on-site at the School (at either of its Egrove or Park End Street sites) or off-site at client premises or elsewhere, with oversight responsibility for the smooth delivery of the programme, together with the programme coordination team
- As engagement team lead, ensure that Programme Coordinators are fully briefed on the project plan for each programme and that they understand their role. Provide guidance and support to Programme Coordinators on all aspects of programme planning, logistics and delivery, ensuring outstanding standards and set processes are followed – resulting in Programme Coordinators having robust and detailed project plans and ensuring that they are fulfilling their roles and responsibilities for each programme
- Ensure quality standards in documentation, communications and programme materials by reviewing key programme documents to ensure that they are quality assured

- Promote a client focused, professional, empowered and purposeful culture delivering service of the highest quality and professional standards, through your day to day work as well as through the line and matrix management of others.
- Work closely with the Programme Coordinators in each of their engagement teams and with other departments to ensure the provision of high-quality customer service at all times. Service level scores are monitored on every engagement, the post holder will be required to ensure that feedback and evaluation scores are collated, summarized and distributed accordingly
- Work closely with the Programme Coordinators line manager to assist with the development of the Programme Coordinators in their project teams. Liaise with the line manager on programme hours, work/life balance and any learning or behavioural issues to be addressed
- Manage, input / track activities and decisions that are required to ensure an integration of innovative practices within Custom Executive Education.
- Maintain a good understanding of the criteria which affect the Executive Education rankings, and appreciating the significance of excellent programme delivery and outstanding service in attaining the top 5 position to which the School aspires

#### *Budgets, Financials and Contracts*

The Post-holder will work closely with the finance team to create, manage and track client programme budgets. The post holder will be responsible for the management of all budgets within their portfolio; these can amount to £3m+ per annum. The engagement manager will:

- Create budgets using the supplied template, ensuring that each budget is approved by the relevant parties
- Plan, forecast, monitor and approve expenditure ensuring that the proper financial procedures are followed and provide internal and client reconciliation as required and agreed
- Provide effective and efficient management of the programme budgets, work in a proactive manner to ensure that costs are monitored in 'real-time' and manage this within your project teams to ensure that margins are maintained
- Follow all School processes and procedures to ensure all financial and contractual elements are adhered to
- Lead the contract renewal process, taking advice from legal advisors as necessary
- Work with the relevant school officers (e.g. Financial controller) to ensure that appropriate arrangements are made with individuals to secure, induct and remunerate the timer of those teaching or undertaking other duties within the programmes in your portfolio
- Ensure that the engagement team and all programme contributors are aware of any specific contractual issues (e.g. confidentiality) affecting engagement delivery
- Update and maintain client account and opportunity records on Salesforce

### *Strategy, Leadership and Other*

- The engagement manager will be involved in future or repeat business engagement and design planning with their client(s) and will have responsibility for working with the commercial support team to develop the contracting and financials for potential new business. The engagement manager will work with the support of the legal team and with the support of a Client Director/Programme Director
- Build effective strategic relationships across departments, leading collaborative project teams across services, with the personal credibility to impact at all levels both internally and externally developing your external reputation through client interaction and stakeholder engagement
- Understand and communicate to others the factors which determine the quality of the client experience and lead by example
- Demonstrate a strategic understanding of Executive Education and can influence at a senior level through planning, preparation and execution of both day-to-day tasks and specific projects
- Create, develop, manage and implement continuous improvement initiatives within the team
- Contribute and assist with the induction and specific training elements of new EMs, or other team members (i.e. training on budgets, processes, documentation etc.)
- Contribute and input in team, departmental and school wide projects – this may include the opportunity to mentor less experienced individuals within the School (in areas not related to your role)
- Carry out any other administrative or managerial duties delegated or request by the Senior Client Engagement Manager and the Client Director.

### *People Management*

- Engagement Manager may have line management responsibility of Project Management Officer, this is dependent on Cluster and role requirements for client delivery
- They will work with the Senior Client Engagement Manager to set objectives for the PMO in line with the strategy for Custom Executive Education and the Cluster Business Plan
- Hold regular one to one meeting with line report(s) and ensure that relevant work and personal objectives are set and reviewed. Request and collate 360 feedback to use as part of their ongoing development

### **Selection criteria**

#### **Essential**

1. Demonstrable experience of project management within a high-performance customer service role; with experience of planning, managing and tracking multiple projects to meet tight deadlines, without compromising quality
2. Experience of managing budgets; experience of building cost elements on projects and tracking actual expenditure against a budget

3. An organised and structured approach to work and an ability to work under pressure, without direct supervision to meet deadlines, reorienting at short notice as required
4. Demonstrable experience as a client relationship manager for global and complex organisations, working in partnership with the client to grow the account
5. First rate interpersonal and communication skills (both oral and written) and an ability to work with senior corporate contacts, external stakeholders and within the academic community
6. Meticulous approach, solution focused, with keen attention to detail. Flexible approach to work and the duties - there are core hours, however some events are scheduled outside of the business day, and some will require work away from Oxford
7. High level of IT literacy and proficiency with standard office software as well as knowledge of project management software; willingness to learn new skills and approaches

### **About the University of Oxford**

Welcome to the University of Oxford. We aim to lead the world in research and education for the benefit of society both in the UK and globally. Oxford's researchers engage with academic, commercial and cultural partners across the world to stimulate high-quality research and enable innovation through a broad range of social, policy and economic impacts.

We believe our strengths lie both in empowering individuals and teams to address fundamental questions of global significance, and in providing all of our staff with a welcoming and inclusive workplace that supports everyone to develop and do their best work. Recognising that diversity is a great strength, and vital for innovation and creativity, we aspire to build a truly diverse community which values and respects every individual's unique contribution.

While we have long traditions of scholarship, we are also forward-looking, creative and cutting-edge. Oxford is one of Europe's most entrepreneurial universities. Income from external research contracts in 2014/15 exceeded £522.9m and ranked first in the UK for university spin-outs, with more than 130 spin-off companies created to date. We are also recognised as leaders in support for social enterprise.

Join us and you will find a unique, democratic and international community, a great range of staff benefits and access to a vibrant array of cultural activities in the beautiful city of Oxford.

For more information please visit [www.ox.ac.uk/about/organisation](http://www.ox.ac.uk/about/organisation)

### **Saïd Business School**

Saïd Business School blends the best of new and old. We are a vibrant and innovative business school, but yet deeply embedded in an 800 year old world-class university. We create programmes and ideas that have global impact. We educate people for successful business careers, and as a community seek to tackle world-scale problems. We deliver cutting-edge programmes, including the highly regarded MBA, Executive MBA, a number of specialist MScs, a portfolio of custom and open programmes, and accredited diplomas for executives, and we undertake ground-breaking research that transform individuals, organisations, business practice, and society. We are an international and outward looking School with our programme participants coming from more than 50 countries.

We seek to be a world-class business school community, embedded in a world-class University, tackling world-scale problems.

Further information about Saïd Business School is available at [www.sbs.oxford.edu](http://www.sbs.oxford.edu)

## **Social Sciences**

The School is a department within the Social Sciences Division, one of four academic Divisions in the University, each with considerable devolved budgetary and financial authority; and responsibility for providing a broad strategic focus across its constituent disciplines.

The Social Sciences Division represents the largest grouping of social sciences in the UK: home to a number of outstanding departments and to the internationally ranked Law Faculty; all are committed to research to develop a greater understanding of all aspects of society, from the impact of political, legal and economic systems on social and economic welfare to human rights and security. That research is disseminated through innovative graduate programmes and enhances undergraduate courses.

For more information please visit <http://www.socsci.ox.ac.uk/>

## **Executive Education at Saïd Business School**

The School incorporates the Executive Education activities of Oxford University. In recent years our Executive Education activities have grown substantially and we are on track to become a top 5 global provider of Executive Education.

Rated by the Financial Times in 2014 as the UK's #1 provider of Executive Education, and ranked #10 globally, the School offers two types of executive management programmes: open programmes available to managers irrespective of organisation, and custom programmes commissioned by organisations for their executives. The School provides unique learning solutions for high profile clients and prides itself on its outstanding customer focus. For more information please visit <http://www.socsci.ox.ac.uk/>

## **How to apply**

If you consider that you meet the selection criteria, please submit your application to [vacancies@sbs.ox.ac.uk](mailto:vacancies@sbs.ox.ac.uk)

Applications must consist of the following:

- a curriculum vitae
- a covering letter explaining how the candidate meets the eligibility and selection criteria (no more than 1-2 pages)

The supporting statement should explain your relevant experience which may have been gained in employment, education, or you may have taken time away from these activities in order to raise a family, care for a dependant, or travel for example. Your application will be judged solely on the basis of how you demonstrate that that you meet the selection criteria outlined above and we are happy to consider evidence of transferable skills or experience which you may have gained outside the context of paid employment or education.

Please save all uploaded documents to show your name and the document type.

All applications must be received by **midday** on the closing date stated in the online advertisement.

If you have any further queries, please contact us by telephoning +44 (0) 1865 288504 or by emailing [vacancies@sbs.ox.ac.uk](mailto:vacancies@sbs.ox.ac.uk).

#### **Information for priority candidates**

*A priority candidate is a University employee who is seeking redeployment because they have been advised that they are at risk of redundancy, or on grounds of ill-health/disability. Priority candidates are issued with a redeployment letter by their employing departments.*

*If you are a priority candidate, please ensure that you attach your redeployment letter to your application (or email it to the contact address on the advert if the application form used for the vacancy does not allow attachments)*

#### **Important information for candidates**

##### **Pre-employment screening**

Please note that the appointment of the successful candidate will be subject to standard pre-employment screening, as applicable to the post. This will include right-to-work, proof of identity and references. We advise all applicants to read the candidate notes on the University's pre-employment screening procedures, found at:

[www.ox.ac.uk/about/jobs/preemploymentscreening/](http://www.ox.ac.uk/about/jobs/preemploymentscreening/).

##### **The University's policy on retirement**

The University operates an employer justified retirement age for all academic and academic-related posts (grade 6 and above), for which the retirement date is the 30 September immediately preceding the 68th birthday. The justification for this is explained at:

[www.admin.ox.ac.uk/personnel/end/retirement/revisedejra/revaim/](http://www.admin.ox.ac.uk/personnel/end/retirement/revisedejra/revaim/).

For **existing** employees any employment beyond the retirement age is subject to approval through the procedures: [www.admin.ox.ac.uk/personnel/end/retirement/revisedejra/revproc/](http://www.admin.ox.ac.uk/personnel/end/retirement/revisedejra/revproc/)

There is no normal or fixed age at which **support staff** in posts at **grades 1–5** have to retire. Support staff may retire once they reach the minimum pension age stipulated in the Rules of the pension scheme to which they belong.

##### **Equality of Opportunity**

Entry into employment with the University and progression within employment will be determined only by personal merit and the application of criteria which are related to the duties of each particular post and the relevant salary structure. In all cases, ability to perform the job will be the primary consideration. No applicant or member of staff shall be discriminated against because of age, disability, gender reassignment, marriage or civil partnership, pregnancy or maternity, race, religion or belief, sex, or sexual orientation.

## Benefits of working at the University

### Training and Development

A range of training and development opportunities are available at the University. Further details can be found at [www.ox.ac.uk/staff/working\\_at\\_oxford/training\\_development/index.html](http://www.ox.ac.uk/staff/working_at_oxford/training_development/index.html).

### For research staff only: Support for Research Staff

There is a particularly wide range of support for career development for research staff. Please visit: [www.ox.ac.uk/research/support-researchers](http://www.ox.ac.uk/research/support-researchers) to find out more.

### Pensions

The University offers generous occupational pension schemes for eligible staff members. Further details can be found at [www.admin.ox.ac.uk/finance/epp/pensions/pensionspolicy/](http://www.admin.ox.ac.uk/finance/epp/pensions/pensionspolicy/).

### Information for international staff (or those relocating from another part of the UK)

A wealth of information is available on the University's International Staff website for staff who are relocating to Oxford from abroad, at [www.admin.ox.ac.uk/personnel/staffinfo/international/](http://www.admin.ox.ac.uk/personnel/staffinfo/international/).

### The University of Oxford Newcomers' Club

The Newcomers' Club is aimed at helping partners of newly-arrived visiting scholars, graduate students and academic members of the University to settle in and to meet people in Oxford.

### Transport schemes

The University offers a range of travel schemes and public transport travel discounts to staff. Full details are available at [www.admin.ox.ac.uk/estates/ourservices/travel/](http://www.admin.ox.ac.uk/estates/ourservices/travel/).

### University Club and University Sports Facilities

The University Club provides social, sporting and hospitality facilities. It incorporates a Club bar, a cafe and sporting facilities, including a gym. See [www.club.ox.ac.uk](http://www.club.ox.ac.uk) for all further details.

University staff can use the University Sports Centre at discounted rates, and have the chance to join sports clubs. Please visit [www.sport.ox.ac.uk/oxford-university-sports-facilities](http://www.sport.ox.ac.uk/oxford-university-sports-facilities).

### Childcare and Childcare Vouchers

The University offers quality childcare provision services at affordable prices to its employees. For full details about the services offered, please visit [www.admin.ox.ac.uk/childcare/](http://www.admin.ox.ac.uk/childcare/). **NB: Due to the high demand for the University's nursery places there is a long waiting list.**

The University also offers nursery fee payment schemes to eligible staff as an opportunity to save tax and national insurance on childcare costs. Please visit [www.admin.ox.ac.uk/childcare](http://www.admin.ox.ac.uk/childcare).

### Disabled staff

The University is committed to supporting members of staff with a disability or long-term health condition and has a dedicated Staff Disability Advisor. Please visit [www.admin.ox.ac.uk/eop/disab/staff](http://www.admin.ox.ac.uk/eop/disab/staff) for further details.

### BUPA - Eduhealth

Bupa Eduhealth Essentials private medical insurance offers special rates for University of Oxford staff and their families [www.eduhealth.co.uk/mini-site/](http://www.eduhealth.co.uk/mini-site/).

### All other benefits

For other benefits, such as free entry to colleges, the Botanic Gardens and staff discounts offered by third party companies, please see [www.admin.ox.ac.uk/personnel/staffinfo/benefits/](http://www.admin.ox.ac.uk/personnel/staffinfo/benefits/).

