The Global Recruitment Co.
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Role: Head of Sales/ Head of Customer Service or Field Sales

Location: Leeds
Salary expectations: £65,000 as a base
Notice Period: Available Immediately

Professional Summary

Strategic and results-oriented leader with over 15 years of experience in customer relationship management, operations excellence, and team leadership across service industries. Proven expertise in managing complex client relationships, ensuring operational efficiency, and delivering high-quality service across large portfolios. Adept at driving P&L growth, identifying revenue opportunities, and managing projects from inception to completion. A hands-on, proactive approach to managing performance, compliance, and customer satisfaction, combined with a passion for fostering a culture of operational excellence and high client engagement. Skilled in managing teams, optimising processes, and building strong partnerships to exceed customer expectations.

KEY SKILLS

- **Influencing and negotiating**
- **Coaching, Training & Performance Development**
- **Business analysis**
- **Judgement & Decision Making**
- **Revenue Generation**
- **Strategic and operational planning**
- **Process review and change management**
- **Business/Commercial acumen**
- **Relationship and Account Management**

Career Summary

Consultant
Self Employed **July 24 - Present**

Supporting businesses in the financial services and home improvement sectors create efficient and effective sales and service operations. Producing high-quality business documents, including Standard Operating Procedures (SOPs), GDPR, Compliance, Service Level Agreements and Terms and Conditions. I collaborate with stakeholders to ensure accuracy and alignment with client objectives, delivering clear, impactful materials that support decision-making and business growth. My focus is on creating documents that ensure, adherence to industry standards and best practices.

Lead Tech **Jan 24 – June**
National Account Director

Part of the senior leadership team, leading, coaching and developing the account management and lead engagement teams. Responsible for the retention and growth of accounts, ensuring that the team have clear purpose, feel empowered in their role so that they can build strong relationships with customers and key stakeholders both internally and externally and feel motivated to achieve results.

Key responsibilities & achievements:

- Managing key strategic accounts identifying and improving commercial success.
- Retained 95% of accounts.
- Responsible for national business accounts with a commercial book value of £7m
- Prospecting cold and warm business opportunities.
- Identifying growth opportunities in key accounts
- Responsible for a team of 12, 3 Account managers and 9 agents.

Safestyle UK **Jan 23 - Oct23**

Head of Customer Success

A member of the senior leadership team, reporting directly to the Chief Revenue Office, leading, coaching and developing the Customer Success and Consumer Finance teams. Responsible for all the sales activity and support processes, ensuring the sales teams had the tools and resources required to be successful. Accountable for the regulated complaints processes, ensuring the business was operating compliantly in line with GDPR, FCA and FOS standards including Consumer Duty implementation and all FCA and FOS reporting.

Key responsibilities & achievements:

- Responsible for a team of 25, Customer Success and Consumer Finance agents.
- Implemented the consumer duty policy across the sales function, ensuring that all the sales consultants completed mandatory learnings and were educated on the vulnerable customer policy.
- Identified a need for and implemented standard operating procedures across the function leading to a more effective, compliant and measurable operation.
- Ensured we were treating customers fairly and that a fair value assessment was completed for all customers when presented with our financial products/solutions (consumer finance options)

- Fulfilled a directive from the FCA which was to provide a timebound report detailing all our sales processes, evidence of our compliance monitoring of the sales force and details of our regulated complaints processes along with examples demonstrating adherence to these processes.
- Responsible for the compliance of the sales function, regarding financial promotions and how our sales consultants sold to our customers. Produced and implemented a quality assurance framework and a regulated complaints management process.
- Budget responsible of £500k for annual venues activity for sales and marketing.

Colmore Ltd **Jan 21 – Nov 22**
Operations Transformation Analyst

Member of the senior leadership team reporting to the Chief Operations Officer responsible for capturing processes and identifying areas of improvement to improve the operational efficiencies, reducing costs, and increasing outputs. In addition, acting as a mentor for the leadership team providing them with tools, systems and enabling them to successfully lead their people. Act as a business manager, ensuring that key strategic objectives were being achieved.

Key responsibilities & achievements:

- Process capture and identifying continuous improvement strategies to improve the customer journey and efficiencies.
- Identified opportunities through collaboration in functions to reduce cost and improve outputs.
- Designed and implemented Standard Operating Procedures.
- Process capture and identifying continuous improvement strategies to improve the customer journey and efficiencies.

Age Partnership **Nov 2011 – Dec 2020**
Head of Sales

Responsible for the operational delivery and performance of the sales function outbound and inbound call activity B2B & B2C, delivering qualified leads to our Equity Release, Wealth, Insurance and Mortgage advisors managing circa 85 FTE. Key objectives have focused on growth and establishing a scalable, operations model to facilitate expansion in the Equity Release market.

Key responsibilities & achievements:

- Succeeded in delivering a base profit of £5.4m by delivering high quality opportunities across all advice functions.
- Resource planning, recruitment, training, performance monitoring, regulatory compliance, continuous improvement, implementation and delivery of business objectives and setting KPIs.
- Personally selected by CRO to drive service of Contact Centre and Key Account operational relationships.
- Planned and implemented the migration of all the main sales channels from one department to another. Increasing lead conversion by 10% on Inbound opportunities, Outbound dialler activity by 1.5%.
- Designed and implemented a robust quality evaluation process which included a revised process to capture immediate caller feedback together with route cause analysis.
- Introduced a much-improved process to capture reason for call traffic and in turn act on value and failure demand.
- Consistent achievement of quality (compliance, customer experience, accuracy) and productivity (grade of service, calls answered) KPIs.
- Acquired and transformed a small team of call handlers and transformed them into the pre-sales operating hub of the business generating over 1,000 qualified appointments per week for Equity Release, Mortgage and Wealth advisors.
- Identified and implement new qualification processes to support the face-to-face advice function, achieving 70% diary fill.
- Introduced a talent programme to develop our future advisors, over 40 colleagues passed through the programme and developed into advisors.
- Responsible for maintaining and retaining the operational relationship with Key Accounts.
- Identified alternative solutions to meet customer needs, where Equity Release was not a suitable option.
- Implemented resource planning tool to enable effective resourcing of 85 FTE Contact Centre including engaging other business areas to provide peak time support on an ad hoc basis.
- Sickness rate consistently below 4% and negative attrition zero for in excess of 2 years.

- End to end mapping of the customer journey, redesigned and implemented a new front-end operating model to improve the customer journey and reduce cost of service.

EARLY CAREER includes

Jump Money **Jan 2011 – Nov 2011**
Protection Sales Manager

AXA **May 2009 – Dec 2010**
Financial Planning Manager

HBOS **Sep 2006 – April 2009**
Financial Planning Manager

Bright Finance Ltd **June 2002 – Aug 2006**
Operations Manager

Education and Professional Qualifications

Certificate in Financial Planning (CeFa)
BA Recreation Management

Interests – Music, Guitar, Clay Pigeon Shooting, socialising with family and friends.