

## In-Form Head of Customer Success & Support

<b>Contract Type:</b>	Permanent
<b>Location:</b>	We are flexible about the location of this post. Regular travel will be required across the UK and occasionally overseas, including frequent attendance at Homeless Link's offices in central London. Please note that although our office is currently open, staff numbers are limited and most Homeless Link staff continue to work from home.
<b>Hours:</b>	Full Time
<b>Salary Scale:</b>	£52,429.00 - £56,339.00 (with London Weighting) £48,657.00 - £52,255.00 (without London Weighting) It is our policy to recruit at the first point on the scale
<b>Closing Date:</b>	12 noon on Monday, 28 <sup>th</sup> September 2020
<b>Interview Dates:</b>	Interviews to take place between 7 <sup>th</sup> and 14 <sup>th</sup> October

Thank you for your interest in this post.

Homeless Link is the national membership charity for frontline homelessness agencies and the wider housing with health, care and support sector in England. With over 800 members, we work to improve services and campaign for policy change that will help end homelessness and ensure that everyone has a place to call home and the support they need to keep it.

In-Form is our complete client relationship and service management system for housing and homelessness organisations, built on the Salesforce platform. Income from sales, consultancy and training helps to fund Homeless Link's work and In-Form also ensures that our customers have access to the information they need to improve services and demonstrate the impact their work has. As sales of our product continue to grow we have created this new role as Head of Customer Success & Support to focus on developing and maintaining customer relationships that promote retention and loyalty.

We are seeking a manager from a technology background, which includes Salesforce and with experience of managing a support desk. The successful candidate will have an extensive knowledge of Salesforce technology and high level communication skills, particularly the ability to explain technical issues clearly. This pack will give you some more information about Homeless Link and the role. Please feel free to contact us if anything is not clear or you have further questions.

We are actively seeking to increase diversity within our organisation and would greatly welcome interest from people with direct experience of homelessness, from a black or minority ethnic background and/or with a disability.

We look forward to receiving your application.

**Nick Leary**  
**In-Form Assistant Director of Technology**

# About us

Homeless Link is the national membership charity for frontline homelessness services.

## Our Vision and Mission

Homeless Link's **vision** is that everybody should have a place to call home and the support needed to keep it.

Our **mission** is to develop, inspire, support and sustain a movement of organisations working together to achieve positive futures for people who are homeless and vulnerably housed.

## Our Values

**Committed:** we work tirelessly to drive social change to end homelessness for good

**Compassionate:** We believe in the value and potential of people. We champion justice, humanity and compassion for all

**Credible:** We speak the truth based on evidence. We listen and learn, ask questions and respond with honesty and integrity

**Collaborative:** We believe in the power of partnership, working together for better results - with our members, our partners and people experiencing homelessness

## What we do

Homeless Link works with our members and experts by experience to improve support for people who are experiencing homelessness or are vulnerably housed, and sustain a movement working towards a country free from homelessness.

### Provide advice and support

Our national teams and regional partnership managers provide advice, share good practice and offer consultancy and support to help our members to be more effective, impactful and resilient. We also develop and offer innovative products and funding to improve services.

### Deliver information and resources

We produce and share a wealth of up-to-date information, including good practice toolkits, guidance, the latest research, sector news and policy updates. We also pilot new approaches to tackling homelessness, and manage a directory of thousands of services to enable the public and professionals to find local help and support.

### Influence policy and shape practice

We campaign to improve the policies that affect people experiencing homelessness and work with local and national government to bring about change. Using our detailed knowledge of what's happening on the ground, gathered from our members, we shape and embed changes in practice.

### Facilitate networking and learning

We enable members to learn and network through our national, regional and online events, providing professionals with the opportunity to share knowledge, experiences and solutions. We also support staff to improve their skills through our training programme.

## For more information

Visit our website: [www.homeless.org.uk](http://www.homeless.org.uk)  
<http://in-form.org.uk/>

# The job

## ROLE DESCRIPTION

### JOB PURPOSE

In-Form is Homeless Link's client recording system and is an application built on the Salesforce platform. The Head of Customer Success & Support will focus on developing and maintaining customer relationships that promote retention and loyalty. They will lead the support team and work closely with customers to ensure high levels of customer satisfaction and return on investment.

### ACCOUNTABILITY

The Head of Customer Success & Support reports to the In-Form Assistant Director – Technology.

### LOCATION

We are flexible about the location of this post. Regular travel will be required across the UK and occasionally overseas, including frequent attendance at Homeless Link's offices in central London.

### MAIN RESPONSIBILITIES

#### **In-Form and Salesforce**

- To lead on and manage the In-Form Customer Success & Support team.
- Gain a deep understanding of the In-Form customer experience to identify how best to support customer In-Form systems.
- Improve the support offer to our customers and ensure technical solutions are in place to manage the support offer.
- Maintain and develop our case management systems to improve team and customer communication, accuracy of recording/reporting and knowledge sharing.
- To develop and maintain a customer community to provide a platform to monitor support cases, provide a forum for customer collaboration and a resource repository.
- Ensure Support desk analytics provide the data necessary to identify customer training requirements, development opportunities and staff performance.
- To work with the In-Form Business Development team to develop, manage and implement the customer success strategy
- Ensure information about support issues and ideas are communicated to the Product team
- To work with In-Form Assistant Director – Technology and technical leads to develop effective processes and systems to ensure high quality delivery to customers and information to management
- To keep up to date with Salesforce and related technologies to ensure that In-Form remains up to date and relevant to our customers

#### **Management**

- To support, develop and line manage the In-Form Customer Success & Support team, in line with organisational policies and procedures.
- To ensure that technical staff operate at a level of competence specified to their post.

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- To coach, support and develop staff to enhance their level of competence and take effective steps to deal with underperformance.
- To work with other managers to achieve Homeless Link's objectives and to ensure that the work of In-Form supports, and is co-ordinated with, other teams across Homeless Link

### **General**

- Roles and objectives in Homeless Link may change. All members of staff are expected to be prepared to work flexibly in response to changing business needs.
- All members of staff are expected to undertake any other responsibilities or tasks that are consistent with their role and/or reasonably required by the Chief Executive.
- All members of staff are required to operate in accordance with Homeless Link's values, policies and procedures.

*This is a description of the job as it is presently constituted. It is the practice of Homeless Link to examine job descriptions from time to time and to update them to ensure they relate to the job as then being performed, or to incorporate whatever changes are required to reflect business needs. This will be conducted in consultation with you. It is the organisation's aim to reach agreement on changes, but if agreement is not possible, the organisation reserves the right to insist on changes to your job description, after consultation with you.*

## PERSON SPECIFICATION

### QUALIFICATIONS AND SPECIALIST KNOWLEDGE FOR THE ROLE

#### Essential

- Extensive knowledge of Salesforce technology
- At least 4 current Salesforce certifications or equivalent In-Form experience
- Management, support and coaching skills
- High-level communication skills, particularly the ability to explain technical issues clearly.
- High level interpersonal skills,
- Ability to make best use of staff resources, budget and Salesforce technology to improve the In-Form product

#### Desirable

- Project Management qualification

### EXPERIENCE AND TRACK RECORD

#### Essential

- At least 5 years' experience in a technology environment, including at least 3 years working with Salesforce
- At least 3 years' experience of staff management and leading teams
- Fundamental understanding of SaaS systems, business models and development
- At least 3 years' project management experience
- Experience in managing multiple projects and budgets concurrently
- Managing a support desk
- Working with clients to assess their business processes and requirements and building systems to meet those requirements
- Ability to set and adjust priorities to meet deadlines
- Understanding of the role of In-Form in meeting the current and future business requirements of homelessness services and other voluntary sector agencies
- Understanding of the budgetary, resource and other issues faced by managers in homelessness services and other voluntary sector agencies

### GENERAL REQUIREMENTS FOR ROLES AT HOMELESS LINK

#### Essential

- Willingness and ability on occasion to work outside normal office hours
- Willingness to travel within the UK and occasionally overseas
- Willingness and ability to operate in accordance with the values and policies of Homeless Link
- Willingness and ability to work flexibly in response to changing organisational requirements
- Commitment to bring into the work the views and needs of people with direct experience of homelessness

#### Desirable

- A sound understanding of the causes, consequences and solutions to homelessness based on direct experience

## HOMELESS LINK COMPETENCY FRAMEWORK

Please note that these are for your information only at this stage. You do not have to address them in your application. We will look for evidence of these during the interview and testing stage if you are shortlisted.

### Core Competencies

Personal Contribution	Working with Others	Organisational Contribution
<b>Personal Effectiveness:</b> Demonstrating effective working practices, striving to deliver high performance	<b>Teamwork:</b> Working cooperatively, building and nurturing strong relationships within & outside the organisation.	<b>Resource &amp; Project Management:</b> Achieving results through efficient and effective management of projects and resources
<b>Effective Communication:</b> Demonstrates ability to communicate concisely, accurately and persuasively verbally and in writing with a range of audiences	<b>Stakeholder Focus:</b> Identifying, understanding and striving to exceed the needs of all stakeholders.	<b>Entrepreneurial &amp; Innovative Thinking:</b> Generating and developing imaginative and innovative solutions and opportunities.

### Role or Grade specific competencies

<b>People Management &amp; Development:</b> Actively leading and creating an environment to enable individuals to achieve their maximum potential	<b>Strategic Leadership:</b> Developing and articulating the future direction of the organisation, driving and motivating others to achieve long-term goals.	<b>Business &amp; Commercial Acumen:</b> Demonstrates understanding of the commercial environment, identifying and developing business opportunities.
<b>Expert/Technical Knowledge:</b> Demonstrating best use of required knowledge in specified field ensuring continuous learning and development.		

## How to apply

Please submit

- 1 your CV
- 2 a Supporting Statement in 500 words telling us why you are a good candidate for this role. Refer to the person specification for the experience and skills we are seeking.
- 3 Our Equal Opportunities Form

by email to [recruitment@homelesslink.org.uk](mailto:recruitment@homelesslink.org.uk) by 12.00 noon on Monday 28<sup>th</sup> September 2020.

### Supporting people with disabilities

Homeless Link is committed to improving its employment opportunities for people with disabilities. Please let us know if you require support, modifications, adjustments, or special equipment to assist you with the recruitment process. We will contact you to discuss your requirements further.

### Supporting people with experience of homelessness

As part of Homeless Link's commitment to support people with experience of homelessness, we have committed to giving feedback to applicants who have experience of homelessness

Applications received after the published closing date will not be considered. If you have any questions about the post or the process, please email [recruitment@homelesslink.org.uk](mailto:recruitment@homelesslink.org.uk) quoting the Job Title for this role.

### **Privacy notice for Job Applicants**

**Data controller:** Homeless Link,  
Minorities House,  
2-5 Minorities,  
London EC3N 1BJ

As part of any recruitment process, Homeless Link collects and processes personal data relating to job applicants. We are committed to being transparent about how we collect and use that data and to meeting our data protection obligations.

#### **What information does Homeless Link collect?**

Homeless Link collects a range of information about you. This includes:

- your name, address and contact details, including email address and telephone number;
- details of your qualifications, skills, experience and employment history;
- whether or not you have a disability for which the organisation needs to make reasonable adjustments during the recruitment process;
- information about your entitlement to work in the UK; and
- equal opportunities monitoring information, including information about your gender, ethnic origin, sexual orientation, health and religion or belief.

Homeless Link collects this information in a variety of ways. For example, data might be contained in application forms, CVs, job application cover letters obtained from your passport or other identity documents, or collected through interviews or other forms of assessment.

Homeless Link will also collect personal data about you from third parties, such as references supplied by former employers. We will seek information from third parties only once a job offer has been made and will inform you that we are doing so.

Data will be stored in Homeless Link's HR electronic filing systems and email.

#### **Why does Homeless Link process personal data?**

Homeless Link needs to process your data to enter into a contract with you.

In some cases, Homeless Link needs to process data to ensure that it is complying with its legal obligations. For example, we are required to check a successful applicant's eligibility to work in the UK before employment starts.

Homeless Link 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 organisation to manage the recruitment process, assess and confirm a candidate's suitability for employment and decide to whom to offer a job and assess training needs. We may also need to process data from job applicants to respond to and defend against legal claims.

Homeless Link will process health information if it needs to make reasonable adjustments to the recruitment process for candidates who have a disability. This is to carry out its obligations and exercise specific rights in relation to employment.

Where Homeless Link processes other special categories of data, such as information about ethnic origin, sexual orientation, health or religion or belief, this is for equal opportunities monitoring purposes. Data that the organisation uses for these purposes is anonymised for reporting purposes and is collected with the express consent of applicants. Applicants are entirely free to decide whether or not to provide such data and there are no consequences of failing to do so.

Homeless Link will not use your data for any purpose other than the recruitment exercise for which you have applied, unless you give us permission to do so.

#### **Who has access to data?**

Your information will be shared with colleagues in Homeless Link if access to the data is necessary for the performance of their roles. This includes members of the Central Services team, recruitment panel members for this vacancy and directors in the business area with a vacancy.



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Homeless Link will not share your data with third parties, unless your application for employment is successful and we make you an offer of employment. Homeless Link will then share your data with former employers to obtain references for you.

Homeless Link will not transfer your data outside the European Economic Area.

### **How does Homeless Link protect data?**

The organisation takes the security of your data seriously. It has internal policies and controls in place to ensure that your data is not lost, accidentally destroyed, misused or disclosed, and is not accessed except by our employees in the proper performance of their duties. Access to the Recruitment Email and the Recruitment folder is restricted to the Central Services team. Hard copies of application forms may be made for shortlisting purposes but personal information, eg Name, Address etc is removed and only supplied to panel for applicants attending the interview. All hard copy papers are shredded at the end of the recruitment procedure.

### **How long does Homeless Link keep data?**

If your application for employment is unsuccessful, Homeless Link will hold your data on file for 6 months after the end of the relevant recruitment process. At the end of that period your data is deleted.

If your application for employment is successful, personal data gathered during the recruitment process will be transferred to your personal file and retained during your employment. The periods for which data will be held will be provided to employees in a new privacy notice.

### **Your rights**

As a data subject, you have a number of rights. You can:

- access and obtain a copy of your data on request;
- require Homeless Link to change incorrect or incomplete data;
- require Homeless Link to delete or stop processing your data, for example where the data is no longer necessary for the purposes of processing;
- object to the processing of your data where Homeless Link is relying on its legitimate interests as the legal ground for processing; and
- ask Homeless Link to stop processing data for a period if data is inaccurate or there is a dispute about whether or not your interests override the organisation's legitimate grounds for processing data.

If you would like to exercise any of these rights, please contact Matt Harrison on [Info@homelesslink.org.uk](mailto:Info@homelesslink.org.uk). You can make a subject access request by completing the organisation's Privacy Rights Request Webform at the bottom of the organisations [Privacy and Data webpage](#)

If you believe that Homeless Link has not complied with your data protection rights, you can complain to the Information Commissioner.

### **What if you do not provide personal data?**

You are under no statutory or contractual obligation to provide data to Homeless Link during the recruitment process. However, if you do not provide the information, we may not be able to process your application properly or at all.

### **Automated decision-making**

Recruitment processes are not based solely on automated decision making.