

## **TRAINING OFFICER**

### 1. MAIN PURPOSE OF JOB

To develop and maintain a professional, dedicated training solution – to provide total coverage of all appropriate training needs to CDL clients

### 2. POSITION IN ORGANISATION

- Reports to the Account Development Manager
- Direct contact with all departments and external customers

### 1. SCOPE OF JOB

- To provide high quality training to internal and external clients
- To assist in the acquisition and maintenance of CDL application skills within the department and organisation
- To maintain effective communication with clients to establish training needs
- To evaluate the effectiveness of training and modify materials as appropriate.
- To develop and maintain training material to the highest standards for internal and external courses.

### 1. DIMENSIONS & LIMITS OF AUTHORITY

- To manage own time to meet the high standards of customer care required
- To gain support from Manager/Supervisor to assist with issues or client projects
- To liaise with managers from other departments to agree timescales and costs, or to escalate issues arising.

### 1. QUALIFICATIONS

- Minimum GCSE A-C Grades in Maths and English or equivalent
- Computer literacy and keyboard skills
- Effective communication skills
- Formal training qualification is desirable

### 1. EXPERIENCE

- Minimum of 3 years in a technical training delivery role is essential
- Knowledge of CDL applications and a working knowledge of associated partner links (3<sup>rd</sup> party software) advantageous
- Experience of working within a customer service environment is desirable
- Experience of communicating at all levels up to and including senior management
- Experience of the insurance industry is desirable
- Experience of designing, delivering and maintaining training materials is essential.

## **DUTIES & KEY RESPONSIBILITIES**

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### **To provide high quality training**

- To provide high quality professional training courses and materials

- To provide advice, assistance and information to the Account Development Team and other departments within the organisation, where and when necessary
  - To ensure that all members of staff, new and existing, within the department and external to, are trained on the application to an appropriate level.
  - To discuss any client training needs when necessary
  - Where appropriate, to accompany members of staff on site to evaluate training courses in order to facilitate progress monitoring
  - To approach clients and tailor specific customer training courses to fit their specific requirements.
  - To visit clients to discuss all training requirements, either CDL application/Modules or Third Party software when linked with CDL application.
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**To assist in the acquisition and maintenance of CDL application skills**

- Identify personal training and development needs
  - Participate in appraisal process
  - To develop and maintain a high level of personal understanding of the CDL application software and associated modules.
  - To develop and maintain an awareness of new CDL product developments
  - To ensure that activities are in line with divisional and corporate objectives.
  - To identify personal development requirements in order to maintain application knowledge
  - To demonstrate and communicate a high level of understanding of the CDL application
  - To ensure CDL staff members have an appropriate level of understanding of the CDL application software and associated modules
  - To provide advice and assistance, as required, to colleagues.
  - To ensure that all CDL clients – new and existing – are brought to the highest possible level of understanding of the CDL application and associated modules
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**To maintain effective communication with clients**

- To ensure that training requirements are adequately specified and documented
  - To ensure training provision meets customer requirements and is evaluated appropriately
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**To establish the effectiveness of training**

- To acquire feedback on the courses needed for future planning/management information
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**To develop and maintain training material**

- To maintain training material in line with changes
- To ensure that training materials are appropriate to client's requirements.
- To design training materials that reflect company developments.

JOB TITLE: TRAINING OFFICER

JOB HOLDER

DUTIES AND KEY RESPONSIBILITIES

TO HAVE IN DEPTH KNOWLEDGE OF CDL SYSTEM

- To have a good knowledge of the application software, additional modules and development software. To have understanding of Internet developments and MIS.
- To develop a general understanding of the various hardware platforms

TO PROVIDE HIGH QUALITY TRAINING

- To provide training in all aspects of the application software and special modules for new and existing clients
- To assist when required in the internal training of new and existing members within the organisation.
- To provide demonstration of development software when required to do so.
- Some assistance with the testing of software prior to its release.

TO PROVIDE SUPPORT TO CLIENTS

- Support in terms of application software issues and associated problems
- To assist in the monitoring and providing solutions to calls logged by cooperating with the application and technical support units.

TO ASSIST AND DEVELOP ACCOUNT HANDLING DUTIES

- To provide account management of existing clients and to assist with some new accounts and assist and support senior colleagues with key accounts.

HELP COLLEAGUES TO BECOME MULTISKILLED

- To help new and less experienced colleagues to become more multi skilled to develop their own careers

JOB HOLDER..... IMMEDIATE SUPERIOR.....