



# Client Success Lead (Advantage Dashboard)

Recruitment Pack & Job Description

# Equipping cultural organisations to be resilient and ambitious

The Baker Richards Employee Ownership Trust creates strategies to unlock commercial potential, fueling the artistic / curatorial and social mission of our clients.

We are proud to apply cutting-edge practice developed from working with more than 800 organisations, all around the world.

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# 1. Introduction

Baker Richards helps cultural organisations and visitor attractions grow earned income, enabling their artistic and social missions. We are proud to have worked with over 800 cultural and heritage organisations internationally.

## About Baker Richards

Baker Richards was founded in 2003 and in 2020 entered employee ownership. We are governed by an employee ownership trust with no private shareholders. Employees are consulted in strategic decisions and policies, and there is elected employee representation on our board. We share a passion for the cultural sector and are committed to supporting it to thrive through software and consulting services. Our areas of expertise include admissions pricing, segmentation, memberships, subscriptions and donations, sales forecasting and primary research.

Clients include the National Trust, English National Ballet, Capital Theatres, Metropolitan Opera, Brooklyn Academy of Music, Villa Carlotta, the Charleston Trust, Southbank Centre, New Jersey Theatre Alliance, Edinburgh Zoo (RZSL), National Theatre, Royal Ballet & Opera, Failte Ireland, New York Philharmonic, Nova Cinema, Royal New Zealand Ballet, Thackray Museum of Medicine (a full [client list](#) is available on our website).

On behalf of the National Lottery Heritage Fund, Baker Richards delivers the UK-wide research panel for decision makers in the heritage sector, UK Heritage Pulse. Baker Richards also delivers and manages a big data aggregation platform for UK Theatre and the Society of London Theatre, the Theatre Evidence Centre.

## Our Guiding Principles

1. We are driven by adding value and delivering a return on investment for our clients.
2. We are passionate about quality standards, including methodological rigour and obsession with detail.
3. We believe in continually challenging ourselves and encouraging intellectual curiosity to develop our products and services.
4. We work in partnership with our clients, combining our experience and expertise with their organisational knowledge to test interpretation, exchange ideas and evaluate options.
5. We act with integrity – delivering results and keeping our promises.

We are a small team, and everyone contributes in many different aspects of the company's work. Each individual is given lots of responsibility and the opportunity to be self-directed in their day-to-

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day tasks. We encourage people to grow and develop their roles within the company.

## Proudly Employee-owned

Baker Richards has no private owners. Together with its editorially-independent sister company Arts Professional Media Ltd, we are managed by the Baker Richards Employee Ownership Trust.

Employee-ownership ensures that the companies are managed in the best interests of employees, and that employees are consulted on the major strategic decisions of the group. Our Board includes elected employee representatives. In profitable years, surpluses are distributed to employees in bonuses, and these can be significant.

As an employee ownership trust we individually, and the companies collectively, strive to act at all times with integrity and respect. Each employee is encouraged to assume responsibility for maximising our contribution to the company, for the benefit of present and future employees.



## 2. This Role

### Role Specification

**Main Purpose:** The Client Success Lead will be responsible for ensuring prospective and current clients derive maximum value from Baker Richards' [Advantage Dashboard](#).

We currently have sixteen organisations using the Advantage Dashboard, and plan to double this within a year.

Acting as a primary point of contact for prospective and current clients, you will support them through onboarding, training, and ongoing engagement with the product.

By fostering strong relationships, providing actionable insights, and identifying opportunities for growth, you will play a key role in ensuring client satisfaction and retention while supporting sales, identifying upselling and cross-selling opportunities.

The post holder will report to Head of Data & Insights, Valentina De Sabata

### About You

You are a proactive and customer-focused professional with a passion for building strong client relationships and helping organisations succeed.

You thrive in a role that blends technical aptitude with excellent communication skills, and you enjoy using data to uncover insights and drive decision-making. With a keen eye for detail and a problem-solving mindset, you are adept at managing multiple priorities while maintaining high levels of client satisfaction.

You may already have experience in customer success, account management, or a similar client-facing role, and you're looking to take the next step in your career by working with an insights-based product like the Advantage Dashboard.

## Key Responsibilities

### Client Onboarding & Training:

- Facilitate smooth onboarding processes for new clients, ensuring they understand how to use the Advantage Dashboard effectively.
- Using your thorough knowledge of the product (full training will be provided), deliver engaging training sessions to help client teams adopt and maximise the benefits of the Dashboard.
- Assist clients migrating from Segmentation Engine to Advantage Dashboard to familiarise themselves with the product.

### Client Relationship Management:

- Build and maintain strong relationships with clients, serving as their trusted advisor throughout their engagement with the Advantage Dashboard.
- Regularly check in with clients to ensure their needs are met and their strategic objectives are supported. Organise roundtables / client events, and record all client contact in our Capsule CRM.
- Feed back client requirements and suggestions to the product team.

### Support & Engagement:

- Monitor client usage metrics to identify opportunities for improvement or increased engagement with the Dashboard.
- Respond promptly to client queries and resolve any issues to ensure seamless service delivery.

### Insights & Reporting:

- Working with colleagues, analyse client data to identify trends, risks, and opportunities, providing actionable recommendations based on insights from the Dashboard.

### Sales Prospecting & Contact:

- Identify potential new clients through market research, networking, and lead generation activities. Record sales activity in our Capsule CRM.
- Conduct cold outreach to introduce prospects to the Advantage Dashboard.
- Qualify leads and work closely with the consultants and the Data & Insights team to convert prospects into clients.

Although this provides a guide to duties, please be aware that, as we are a small company, a high degree of flexibility is required.

## Person Specification

While learning opportunities will be provided, candidates invited to interview will have demonstrated the following essential skills, knowledge and experience:

- Strong communication and interpersonal skills with the ability to build rapport and maintain professional relationships.
- Analytical mindset with experience in interpreting data to drive actionable insights.
- Evidence of a commitment to excellence, delivering work to high quality standards with precise attention to detail.
- Strong organisational skills including juggling multiple priorities, meeting deadlines and working independently.
- You will be an articulate native or highly fluent English speaker, with excellent written and verbal communication skills.
- Knowledge of or understanding of the cultural sector. Experience working with box office or audience data will be a distinct advantage.
- Experience of sales, business development or customer success roles or an interest in developing in this area

## Personal Attributes

- A belief in and passion for the work of Baker Richards.
- High emotional intelligence with empathy for client needs and challenges.
- An independent self-starter who relishes responsibility and uses initiative to solve problems.
- A confident professional with a 'can-do' attitude that inspires trust.
- A commitment to excellence, delivering work to high quality standards with precise attention to detail.
- Intelligent, with enthusiasm, energy and an eagerness to learn.

## Terms of Employment

We envisage this as a full-time (40 hours per week) role. However, as an employer which supports flexible working, we are open to considering proposals e.g. for compressed hours or alternative patterns of working subject to these being sufficiently flexible to meet the requirements of the job.

We are a home-working company, though occasional travel is an essential requirement of this role. This will include meeting existing and potential clients and travel to conferences (mainly UK, but potentially some international). In some cases, this may mean travelling in the early morning, evening or at the weekend and occasionally staying away from home. A location with access to good transport links is therefore preferable.

## Remuneration & Terms

The starting salary for this role is £30,000, plus bonuses (see below).

From their second year of service staff become eligible to benefit from bonuses related to the company's performance, on top of basic salary.

There is a six-month probationary period, with one month's notice of termination required from either party, rising to two months after one year.

Paid annual holiday entitlement of 25 days per annum plus all statutory/public holidays (usually 8 days per year), plus an additional day at new year and any Christmas office closure. Holiday entitlement increases with length of service.

Pension: A NEST auto-enrolment occupational pension scheme is provided.

Contract duration: Permanent

We encourage staff to engage with arts, culture and visitor attractions and provide financial support for ticket purchases.

Baker Richards prides itself on being a flexible and compassionate employer – if you do not see information here which you would hope for when considering a role, please get in touch with Natalia Coe at [careers@baker-richards.com](mailto:careers@baker-richards.com) to let us know.



“The long experience and deep expertise of the Baker Richards team has been invaluable in helping us introduce a more evidence-based approach to pricing at the Royal Opera House that is already driving significant revenue growth.”

Royal Opera House



### 3. How to apply

If you would like a confidential conversation about the role, please email Robin Cantrill-Fenwick – [robin@baker-richards.com](mailto:robin@baker-richards.com) – to arrange a time for a telephone/online conversation with Robin or Valentina De Sabata.

If you decide to apply, the process is outlined below.

Your application should include:

- A covering Letter (maximum 2 pages, addressed to Valentina De Sabata) which explains how your competencies and experience fit the job description and person specification.
- A copy of your CV.
- A completed Applicant Details Form: this can be downloaded from <http://www.baker-richards.com/careers/>
- Although it is not a compulsory part of your application, we would be grateful if you would also return a completed Monitoring Form in order to help us monitor our recruitment practice: this can be downloaded from <http://www.baker-richards.com/careers/>. If you return the form with your application, we guarantee that it will be removed before your application is considered and that the details will be stored anonymously and the form itself will be deleted.

- Please apply by email c/o [careers@baker-richards.com](mailto:careers@baker-richards.com) with the subject line “Client Success Lead”. Please ensure that your attachments are in MS Word or PDF format.
- The deadline for applications is 9am on Wednesday 2 July. Initial interviews will take place on Wednesday 9 or Thursday 10 July.
- For information about how we process your personal data please see the privacy notice on our website – [www.baker-richards.com](http://www.baker-richards.com)

## 4. About Baker Richards

Baker Richards is a leading international consulting and software firm that aims to foster a thriving cultural sector by helping organisations achieve their commercial potential. Founded in 2003, our areas of expertise include admissions pricing, affiliation and customer segmentation and we are extremely proud of the return on investment we deliver for clients. We are a team of consultants, researchers, developers and culture lovers working across the UK.

We have now worked on over 800 projects, including for many of the world's leading cultural institutions and attractions.

Clients include:

