



Position Details

Business Entity	Kaplan Professional Education	Department	CPD
Job Title	CPD Client Support Representative	Location	Sydney
Reports To	CPD Operation Manager	Direct Reports	Nil

Overall Purpose

The CPD Client Support Representative is responsible for responding to inbound client and subscriber queries via phone and email for Kaplan's online Ontrack products, providing product training, managing subscriptions and assisting in the rollout of learning material.

Ontrack is a unique online CPD (Continuing Professional Development) solution for both organisations and individuals within the financial services and mortgage broking industry who are obligated to meet ASIC's compliance requirements for RG146 and RG206. We provide our subscribers with engaging multimedia content, along with effective reporting functionalities and tracking tools that helps manage a business's CPD requirements.

Key Responsibilities

Support clients and subscribers with CPD related queries

- To provide excellent customer service and support to our existing clients and subscribers through various channels (via phone, email and face to face)
- Provide CPD Ontrack product training to clients
- Proactively recognise customer needs and identify appropriate solutions to improve products and services
- Assist CPD Operations Manager with ad hoc requests

Coordinate and manage subscription renewals for all CPD products

- Coordinate new client subscriptions for our CPD products
- Follow-up on subscriptions due/overdue for renewal for all CPD products
- Maintaining the client database, ensuring the accurate records of all clients and subscribers

Assist with the monthly roll out of CPD products

- Assist with the HTML creation of the Ontrack articles and multimedia content
- Assist with the upload of the Ontrack training material into our CPD online platform

Contribute to a supportive, positive and safe workplace

- Compliance with all company policies and procedures including WHS legislation requirements
- Ensure as far as is practicable that the workplace, under your control, is safe and without risks to health
- Being a productive member of the Kaplan team by displaying the Company values through your day to day role
- Adherence to Company Policy and Procedure



Qualifications and Skills

Essential

- Customer service
- Database and data literacy skills
- Analytical and reporting skills
- Planning and organising
- Problem solving
- Coaching and training
- Attention to detail
- Team player
- Self-motivated
- Outcome focused
- Excellent communication skills
- Strong time management and decision-making skills
- Experience in working in a customer support team

Desirable

- Experience with subscription-based products and services (i.e. Ontrack)
- Experience in the financial services industry
- Understand the concept and practice of professional development
- Experience with applications such as Salesforce (CRM and currently utilised as our Student Management System) / CAS (Card Access Services)

Employee Signature _____ Date _____

Manager Signature _____ Date _____