

Our Mission

Mission: We are passionate about the transformative power of training, promoting equity of learning through expert, tailored, engaging and values-led training solutions.

Vision: We want to lead the way in revolutionising frontline services, through collaboration and community, to create a national standard of high-quality values-led training.

Our Values

Integrity | Excellence | Fairness | Collaboration | Innovation

Role Details

Job Title	Systems Optimisation & Integration Consultant (6–12 month project)		
Report to:	Tammy Banks and Faye Fox — Co-Directors		
Fee:	Open to proposals — we expect this to be equivalent to a mid-market consultancy rate or project fee		
Job Type	6–12 months (consultancy / freelance contract or PAYE)	Location	Remote / Hybrid (occasional York visits desirable)

About the Role

Transform Your Training is growing, and we want to ensure that our systems and tools are optimised, integrated and fit for future growth — supporting exceptional outcomes for our customers and a positive, values-led experience for our team.

We are seeking a team member passionate about systems optimisation and integration to help us audit, clean up, improve reporting and create dashboards, embed safe and effective AI and automation, and enable our team to work confidently and consistently across key platforms.

This is a hands-on delivery project — not just review and advise. We want a consultant who will (supported by our admin team):

- Review and advise on our current systems
- Clean up and streamline existing systems and data
- Connect key systems and improve data flow — reducing duplication and enabling consistent, accurate information across the organisation
- Implement improvements and integrations
- Build dashboards and workflows

- Document processes and governance
- Train our team in the new systems
- Leave us with a more effective, connected and sustainable digital environment with clear handover and team ownership of improvements.

Our current systems include Microsoft 365 (SharePoint, Teams, Outlook, Planner), Zoom, Mighty Networks, Arlo, Hubspot, SurveyMonkey, Mailchimp and Chat GPT/other AI tools.

Outcomes we are looking for

Over this project, we want to achieve:

- A clear map of our data governance and data flows — showing where information sits, how it moves between systems, and how we ensure GDPR compliance
- A clean-up of current systems and data including SharePoint, HubSpot, Arlo, SurveyMonkey, facilitator contact data, and other key fields to ensure information is held once and is accurate and accessible
- Improved integration and connection across key systems with priority integrations implemented to reduce manual work and improve data consistency
- Dashboards and reporting tools implemented, enabling the team to easily track key operational data, quality assurance metrics, customer outcomes, and internal workflows (including key reminders and calendar-driven actions throughout the year)
- A clear, safe and values-led AI strategy and guidelines, specifying what AI tools we use, when, why, and how, with appropriate training and safeguards
- Recommendations for future-proofing and scalability of systems ensuring we invest time and resource in tools that will grow with us
- Clear, accessible process documentation and user journeys enabling the team to confidently know which system to use when, and how information should flow between them
- Improved cyber security and permissions management, particularly across SharePoint and other key systems, ensuring appropriate access controls and data protection
- Practical policy and procedure recommendations including around data governance, quality assurance processes, IP and copyright management
- Training and support for our team so that staff leave the project confident and able to use systems effectively

- An overall improvement in customer and team communication and experience
- Agreed success criteria defined at the start of the project so that progress and impact can be tracked clearly
- Sustainability and handover leaving our team able to maintain and build on the improvements after the project ends

Main Duties

Key Responsibilities

System oversight, integration and data flow

- Audit current systems, data flows, and integrations
- Clean up existing systems and data, including removal of duplication and improved organisation
- Connect key systems and improve data flow to enable consistent and accurate information
- Implement priority integrations between systems
- Map data governance and ensure GDPR compliance
- Build dashboards and reporting tools to support operational oversight, QA and customer outcomes
- Implement key workflows and calendar-driven reminders to support smooth operation across the year

Training, support and sustainability

- Provide practical training for the team on system use, integrations, and AI guidelines
- Document clear processes and user journeys to ensure everyone knows which system to use and when
- Support a values-led, trauma-informed approach to system use
- Help embed good digital habits and practices across the team
- Ensure clear handover and sustainability so the team can maintain and build on improvements after the project

Resource management

- Provide recommendations for future-proofing and system scalability
- Advise on optimising the use of licences and subscriptions
- Support the Directors in developing a roadmap for future system improvements

Communication and coordination

- Work with the Directors and Managers to ensure system changes support customer outcomes and team wellbeing
- Facilitate clear communication across the organisation about system use and processes
- Help the team move towards having things in one place to reduce fragmentation of data and communication channels
- Support consistent use of systems to enhance customer experience, quality assurance, and compliance

Documentation and governance

- Produce practical, accessible documentation for team use
- Develop and/or recommend policies and procedures covering:
 - Data governance and GDPR compliance
 - Quality assurance processes
 - IP and copyright
 - AI and automation usage
 - System access and permissions
- Support the Directors and Managers in embedding governance best practice into day-to-day team culture

Note: This job description is not exhaustive and may be subject to change as the needs of the organisation evolve.

Person Specification

Personal qualities required for the role

- A highly experienced systems and digital consultant, confident in reviewing and advising on digital infrastructure and strategy.
- Able to combine deep technical knowledge with practical, team-friendly solutions that work in real-world settings.
- Strong understanding of AI and automation, with a focus on safe, ethical use in organisational contexts.
- Well-versed in data governance and GDPR, applying best practice to protect data and ensure compliance.
- Skilled in connecting, integrating and optimising multiple systems to streamline operations and improve efficiency.
- Capable of producing clear, user-friendly process documentation and delivering accessible training to support team adoption.
- Brings a collaborative and values-led mindset, with the ability to work effectively alongside a small, dynamic team.
- Passionate about using digital tools to create better experiences and outcomes for both customers and staff.

How to Apply

We are inviting proposals for this project by email.

Email: admin@transformyourtraining.org

Subject: Systems Consultant Proposal

Please send us:

- A short proposal outlining your approach to this work
- Examples of relevant previous projects
- Your availability from August 2025 onwards
- Your fee structure / preferred pricing model