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| Role  Client Relations Support | Role Holder | Reports to  Operations Manager | Direct Reports  N/A |
| **Purpose of the role**: To provide administration support to the business. | | | |

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| **Deliverables** |
| * To act as a point of contact via telephone to external calls * Liaise with advisers, product providers and clients via telephone, letter and email on associated administration * Proactively participate in team meetings and agree and complete actions where required * Ensure workflow is completed in a timely manner * Scan and link relevant documentation onto the company back office system * Support the New Business process where needed in a compliant and professional manner either manually or online * Track progress of business with product provider and liaise with advisers as appropriate * Processing general administration requests within service levels * Obtaining and preparing documentation in preparation for the advisers meetings with clients (this could include; client packs, valuations, reports and illustrations) * Deal with daily servicing post and update company systems as appropriate * Action daily “tasks” in accordance with Company Standards. |
| **Critical Competencies (skills and abilities needed for the role)** |
| * Work well within a team environment and under own initiative * Proficient use of Microsoft office * Good attention to detail with accuracy. * Ability to work in an organised manner to tight deadlines. * Flexible in working approach * Good written and verbal communication skills * Ability to take responsibility and ownership |

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| **Experience (Relevant for the role)** |
| * working in a Financial Services office providing administration |
| **Core Values (that we live by in the business)** |
| **Be humbly confident valuing yourself and others**   * Communicate clearly. Do not make assumptions or take things for granted. * We are privileged to work closely with our clients, they are always our number one priority. * If something goes wrong, fix it and improve next time. No blame.   **Question and listen carefully, to understand**   * Be genuinely interested in clients and colleagues. * Don’t be afraid to ask more questions to gain the best possible understanding. * Listen, understand and do not jump to conclusions.   **Be honest, open and respectful**   * Treat other as you would want to be treated yourself. * Work to maintain an open and honest environment. * Listen to each other’s views and opinions, whilst feeling comfortable in questioning different ideas.   **Take enjoyment from energy and empowerment**   * Have energy and enthusiasm in what you do. * Be accountable and feel empowered to make a difference. * Enjoy the motivation of a client-focused business.   **Hunger to change and improve**   * Do not be afraid of change. * Continually look for ways to improve our service, processes and communications. * Use your initiative and be prepared to move out of your comfort zone to deliver better outcomes for our client. |