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| RoleSenior Client Relations Support | Reports toOperations Manager | Direct ReportsN/A |
| **Purpose of the role**: To provide administration support to external and internal customers |

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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 (Intelligent Office)
* 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.
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| **Critical Competencies (skills and abilities needed for the role)** |
| * Work well within a team environment and under own initiative
* Proficient use of Microsoft office
* Proficient use and confidence of using IO
* Clear understanding of using Wrap platforms i.e Standard Life and AJ Bell
* 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)** |
| * 2 years working in a Financial Services office providing administration
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| **Core Values (that we live by in the business)** |
| Be humbly confident valuing yourself and others (+)* Working with client, not taking things for granted we are privileged, no assumptions
* Our clients are our number one
* Clear communications
* If something goes wrong, any issues – no blame be solution focused

Question and listen 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 no jumping to conclusions

Be honest, open and respectful (+)* Treat other as you would want to be treated
* Working in an open environment
* Listen to each other’s views and opinions, whilst feeling comfortable in challenging the norm

From energy and empowerment comes enjoyment (+)* Enjoy the motivation of the business
* Be accountable and empowered to make a different
* Be open and honest in your communications internally to support one another

Hunger to change and improve (+/-)* Challenge the norm for better outcomes
* Look for process improvement
* Use your initiative and be prepared to come out of your comfort zone to deliver better
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