



Client Services Implementation Executive

Department:

Client Services

Reports to:

Client Services Implementation Team Leader

Business/Function:

Novia Financial

Main Location:

Cambridge House, Henry Street, Bath

Job Summary/Purpose:

The Implementation Team works closely alongside existing operational and Sales teams within Novia. The aim of the team is to initially provide support through a defined implementation process to train new financial advisers and their support staff to effectively use the Novia platform to transact their business online.

There is also a requirement to cover training and technical referrals for selected existing Novia adviser firms, and to also become involved with bulk migrations onto the platform.

This is an office-based role with the successful applicant's primary focus being proactive customer service, and therefore will be responsible for the following key tasks:

Core Responsibilities

Implementation Process

- > The individual will play an active role in supporting and training advisers and their support staff who are new to the Novia platform using the defined implementation process. This will include close liaison with Sales to ascertain training requirements for the firm through to the hand-over to the Client Services Executives team for day-to-day management once the initial training has completed.
- > On-going support for the adviser firm during submission of their first new business cases to the Novia platform so that the adviser firm achieves a high level of confidence in Novia at an early stage.
- > As this is an office-based role, training will be delivered remotely utilising the WebEx system, but there may be occasions when training is delivered in person to the adviser firm.

Relationship Management

- > To build and maintain strong working relationships with advisers, Sales and colleagues, promoting a 'can-do' environment driven by ownership. This will be done predominantly over the phone but may also include face-to-face visits.
- > In handling client requests, the individual will be heavily involved with maintaining the persistency rate, using relationship management skills, influencing skills and customer service excellence.
- > On-going training requirements undertaken with existing adviser firms, such as refresher training or new developments/functionality training.
- > Use existing internal systems to highlight trends at firm level to provide a greater level of ongoing support.

Delivery of Quality Service

- > Act as a reference point for internal enquiries, and will lead on internal training initiatives when required.
- > Ensure that any technical referrals are dealt with in line with service standards and regulations.
- > Investigate and resolve complex queries/issues within service standards ensuring ownership through to completion.
- > Assist operational teams with initial contact over peak periods (such as tax year end), and sickness/holiday periods where necessary.
- > Assist with coaching of new starters and less experienced staff via the Novia induction programme, on-the-job training and other initiatives as directed.
- > Produce Management Information reports to assist with the delivery of quality service.

Projects

- > The individual will play an active role in projects such as migrations and key client cases.
- > Involvement in technical projects related to department and operation.
- > Responsible for challenging existing processes to maximise efficiency.

Team Membership

- > Focus on developing, implementing and sharing best practices.
- > Act as a focal point for questions and issues from other members of the team.
- > Contribute and lead on internal training activities where required.
- > Contribute to the development of team strategy and objectives.
- > Contribute to continuous team improvement and activities to ensure effectiveness of team.
- > Recognise the importance of working together as a team to maximise team, department and company results.
- > Build knowledge around trends and developments in the Financial Services market (for example, regulation, legislation, product developments) and maintain knowledge of platform developments.

You will, from time to time, be required to undertake other activities that fall within your capabilities as directed by management.

Core Competencies

- > **Motivating Others** – The willingness and ability to motivate and inspire others by means of appropriate challenges, empowerment, rewards and recognition.
- > **Team Work** – The ability to work co-operatively with others, to be a member of a team and work towards the purpose of a common goal.
- > **Decision Making** – The ability to make balanced and sound decisions by understanding issues, problems, and opportunities; comparing data from different sources to draw conclusions; evaluating the probable consequences of alternative solutions and selecting the most promising alternative.
- > **Networking** – Identifying opportunities and taking action to build strategic relationships between one's area and other areas, teams, department, units, or organisations to help achieve business goals.
- > **Client Service** – Taking responsibility for client satisfaction and loyalty by effectively meeting specific client needs and developing and maintaining productive client relationships.
- > **Communication** – The ability to effectively communicate at all levels, both written and verbally, with all internal/external customers.

Specialist Skills, Qualifications and Experience

Essential:

- > Relative experience gained in a training, relationship or client services role.
- > Excellent communication skills, both verbally and written.
- > Good attention to detail.
- > Promote ownership within the team and the wider operation.
- > Strong interpersonal skills and presentation skills.
- > Ability to work well individually and as part of the team.
- > Ability to work to tight deadlines.
- > Financial Services market awareness.
- > Advanced knowledge of MS Office including Word, Excel and PowerPoint.
- > A proactive and innovative approach to problem solving as well as persuasion and influencing skills.

Desirable:

- > Knowledge of Novia's sales structure and process.
- > Extensive knowledge of Novia's secure extranet including all customer journeys and tools.
- > Competent knowledge of key Novia operational processes and procedures.
- > CF1, FA2, IOC or equivalent industry recognised qualification.

To apply for this role, please email an up-to-date CV to jobs@novia-financial.co.uk.