



# Implementation Executive

**Department:** Client Services, Novia Financial

**Reports to:** Implementation Manager

**Main Location:** Cambridge House, Henry Street, Bath

## About Novia

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Novia Financial is an award-winning financial technology company based in the heart of Bath, just a 5-minute walk from the train and bus stations. We launched to market in October 2008 to provide a comprehensive wealth management service or 'full wrap platform' for Financial Advisers and their clients. Novia provides a transparent pricing structure as well as access to a wide range of product wrappers, an all-encompassing suite of portfolio management tools, and access to an extensive range of investments.

For more information about us, please visit <https://www.novia-financial.co.uk/>

## Novia Operations Charter:

- > Ensuring accountability for delivery of good client outcomes.
- > Decisions must be client centric to ensure great results.
- > Delivering quality work is always the focus of our day.
- > Take pride in our work and being part of the Novia team.
- > Treating our clients and each other with respect.
- > Open and honest communication is always the key to success.
- > Trust in each other and Novia's future.

## Job Summary/Purpose

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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 process to train new financial advisers and their support staff on how to effectively use the Novia platform to transact their business online with the aim of making them self-sufficient.

In addition to training, team members also act as a technical referral for Client Services to assist with more technical/complex queries as well as overseeing migrations.

As outlined above, the primary focus of this role is to support and train external users of the Novia platform. As well as taking the lead on internal training and support internal teams.

## 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.
- > Strong interpersonal skills – presentation skills essential.
- > Ability to work well individually and as part of the team.
- > Ability to work to tight deadlines.
- > Previous Financial Services experience.
- > A proactive and innovative approach to problem solving, including persuasion and influencing skills.
- > Advanced knowledge of MS Office including Word, Excel and PowerPoint.

### Desirable:

- > Previous Wrap/Platform customer service experience.
- > Knowledge of Novia's sales structure and process.
- > Extensive knowledge of Novia's Adviser Zone and tools.
- > Competent knowledge of key Novia operational processes and procedures.
- > Industry recognised qualification.

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## Key Responsibilities:

- > Train new external users of the Novia platform (usually remotely) via the 'Implementation' process. This will be done predominantly over the phone but may also include face-to-face visits.
- > Build and maintain strong working relationships with adviser firms and internal teams.
- > Close liaison with Sales and other internal teams.
- > Support adviser firms with first cases and on-going support until confident using the platform.
- > Refresher, new starter and new functionality training for existing users.
- > Lead on internal training initiatives and supporting other operational teams where required.
- > Dealing with technical referrals.
- > Coaching of new starters and less experienced staff.
- > Assist with testing development and new functionality of the platform.
- > Play an active role in projects such as migrations and key client cases.
- > Play an active role in projects to meet team and company objectives.
- > Contribute to team improvement and activities to ensure effectiveness of team.
- > Develop, implement and share best practices within the team whilst continuing to build knowledge around trends in Financial Services and maintain knowledge of platform development.

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.
- > **Teamwork** – The ability to work co-operatively with others, to be a member of a team and work towards the purpose of a common goal. Building and maintain strong working relationships with advisers, Sales and colleagues.
- > **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.

## Working at Novia Financial

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### Some of the benefits of working at Novia Financial:

- > Competitive salary.
- > Annual discretionary bonus scheme.
- > Flexible working requests considered.
- > 25 days holiday entitlement plus bank holidays, with the option to purchase or sell up to 5 additional days per year.
- > Tech Scheme (buy discounted electrical products and pay back monthly via Company payroll).
- > Cycle to Work scheme.
- > Supported and encouraged professional development.
- > Regular social events.
- > Flexible dress code in the office.
- > Private medical scheme.

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- > Income protection scheme.
- > Group contributory pension scheme.
- > Internal mentoring scheme.
- > Employee Assistance Programme (EAP).
- > Interest free season ticket loans for travel costs.
- > Various corporate gym membership rates.
- > Novia Foundation Day in support of charitable activities.

**To apply for this role, please email an up-to-date CV to [jobs@novia-financial.co.uk](mailto:jobs@novia-financial.co.uk)**