



BUSINESS SUPPORT ADVISER (TIER 1)

Job Description

Team: Virtual Services

Purpose of Job:

- To provide expert business support advice and information to small businesses via multiple channels, including Telephone, webchat, email, social media, SMS, to help the customer move their business forward.

Scope of job – main responsibilities:

- Underpinning all of the responsibilities is the role of providing general business advice and assistance with an expectation of flexibility in undertaking responsibilities in keeping with the needs of the service.

Provision of exceptional customer service

- Provide general business advice and effective diagnostic for all enquiries via telephone, web, web-chat and email taking ownership to ensure resolution, referral or a further appointment when required.
- To follow call handling guidelines to ensure the highest level of service is given
- Achieve and maintain quality standards associated through the various stages of the customer journey and the role, in line with contract requirements and set KPI's
- Work flexibly to deliver the service via multiple channels, providing a tailored, friendly, helpful service
- Use appropriate questioning styles to help understand and quickly assess the needs of the customer and business
- Have an excellent understanding of current Government support, regional and local support and all relevant referral partners such as Growth Hubs, LEPs etc
- Articulate services and assess customer requirements, sourcing appropriate services and information to match their needs

- Be able to manage multiple web-chat conversations simultaneously in a professional way
- Provide information in line with customer requirements. Every effort should be made to ensure the intervention leads to a positive tangible impact on their business or business idea
- Utilisation of authorised resources including the Gov.uk Website and any other current Government supported sites or tools and the Knowledge Bank to ensure customers are provided with accurate and consistent information
- Effective diary management and booking of appointments, making appropriate arrangements and preparations, including accurate handover notes, to enhance the customer experience
- Assess customer's eligibility across a range of services or investment funds, making effective decisions on the services they receive and ensuring referrals are made only to relevant, qualifying organisations
- Effectively collect customer data in line with the contract standards to ensure accurate, timely and relevant information is gathered

Coordination and administration of customer journey

- Complete all relevant customer documentation accurately in order to comply with internal or external requirements, ensuring a clear audit trail is maintained irrelevant of the channel
- Ensure all activities are recorded accurately and timely onto the customer relationship management system (CRM) and any other required business systems platforms in accordance with operational standards and processes
- Adhere to strict customer data protection and storage guidelines across all channels
- Ensure that all service and quality standards across the customer journey are adhered to, achieved and maintained
- Achieve all individual and service objectives and targets required in the role, as agreed with Line Manager using self-management against a personal dashboard of performance
- Support development and maintenance of clear work instructions in line with company requirements
- To assist where required with the preparation and execution of internal and external audit requirements
- Manage and prioritise own workload effectively

Position within the organisation

- Reports to the Team Leader (Virtual Services)

Dimensions and limits of authority

- There is no financial budget responsibility
- Decisions will need to be made on a daily basis on the appropriate service provision for customers

We are brilliant standards

- Embrace and demonstrate with integrity, the standards and behaviours which underpin the business's values
- Maintain the highest standard of professional conduct at all times both in business and socially with colleagues, clients, business networks and partnerships
- Commit to the principle and practice of Continuous Professional Development and to undertake additional training to meet individual and organisational needs
- Follow Health and Safety procedures put in place by the business to ensure the safety of you, your colleagues and others who may be affected
- Uphold the business's commitment to equality of opportunity to all and following UMi's Equality, Diversity and Inclusion Policy
- Support the business in achieving its sustainability and environmental aims and objectives
- Contribute proactively to sharing ideas, knowledge and best practice to bring about business improvement
- Undertake any other additional tasks and responsibilities appropriate to the level of this post

Summary of knowledge, skills and experience - essential

- Basic educational standard (GCSE) to high standard including Maths and English
- Demonstrable track record of delivering excellent customer service in a business to business environment
- SFEDI qualification or working towards new Level 5 SFEDI qualification (to be achieved within 6 months of employment in role)
- Exceptional communication skills (written and verbal), including ability to effectively listen to interpret customer requirements

- Excellent ICT literacy including Microsoft Office packages and digital media channels such as web chat, email, Twitter, Facebook etc.
- Demonstrable understanding of business processes and business acumen
- High level of analytical ability to assess customer needs, information and documentation
- Demonstration of sales techniques to reach decision makers and gain commitment
- Ability to organise own workload and self-motivate to achieve targets

Summary of knowledge, skills and experience - desirable

- Previous experience of delivering a business advice service
- Demonstrable understanding of the national business support network and policy landscape
- Experience of working with a depth of different business situations, functions, and key personnel
- Ability to interpret basic business financial information
- Experience of delivering advice to customers via digital channels such as social media or web chat
- Experience of using a Customer Relationship Manager database.

Job holder signature:

Line manager signature:

COMPETENCY AND BEHAVIOURS	ONE OF THE TEAM	SETTING AN EXAMPLE	STANDING OUT FROM THE CROWD
DECISIVENESS	Presents clear information and analysis to aid decision making.	Always present a recommendation which is well considered and underpinned by sound research.	Thoroughly considers factual and personal information and makes recommendations based on financial and reputational factors. Where risks are identified a well thought through mitigation strategy is presented.
BUILDING & ENHANCING RELATIONSHIPS	Recognised as being approachable, takes action to put others at ease. Presents themselves in a professional manner.	Actively invests the time to get to know individuals and organisations and is a source of advice for others.	Is highly approachable and a trusted colleague recognised as a source of advice for others. Takes the time to think through how to approach a new relationship or how they can add value to an existing relationship. Acts as an ambassador of UMi internally and externally.
ORGANISATIONAL AWARENESS	Can describe who we are, what we do and what makes us special.	Actively gets involved in business wide projects and proactively promotes business services	Is well recognised across the business, instigates cross selling opportunities and has a demonstrable understanding of key projects and performance at all times.
DEVELOPING SELF AND OTHERS	Actively participates in training opportunities and in 1:1's to identify areas for self-development.	Proactively offers support to others based on their experience and specialism, and looks for opportunities internally to develop skills and experience or learn from others	Without instruction undertakes both formal and informal development activities such as online webinars, personal research, external training and update sessions. Proactively engages in external opportunities for self-development e.g., involvement in charities, sports clubs etc.
COMMUNICATION & INFLUENCING	Consistently structures both written and verbal communication well, using the most effective method whether face to face, always checking to ensure the recipient has a clear understanding.	Tailors communication effectively to meet the needs of the recipient. Takes the time to understand how best to approach a situation and also actively considers how the other person will perceive things.	Actively develops new strategies for communicating that encourage engagement and presents information effectively.
PLANNING & DRIVE FOR ACHIEVEMENT	Displays a positive outlook at all times, independently plans workload and proactively communicates and negotiates changes to agreed deadlines. Consistently punctual and well organised and always clear about what outcome is required.	Suggests solutions to be able to accelerate activity or re prioritise to enable increased activity to be handled, constructively challenges targets and encourages others to succeed.	Set themselves personally challenging targets, operates independently and proactively makes recommendations for improvement in either team or group methods and approaches.