

SERVICE AND INVESTMENT EXECUTIVE

Salary Group	Technical or Functional Executive
Why your role is important	<p>Your role plays a critical part in our Public Sector Services team, responsible for providing an exceptional service to customers across a range of products/services within UMi through a multitude of channels.</p> <p>Proactively assessing, co-ordinating and deciding on service support, together with the facilitation and undertaking of associated documentation and administration required throughout the customer journey with an expectation of flexibility in undertaking responsibilities in keeping with the needs of the business.</p>

MAIN RESPONSIBILITIES AND KPI'S

- Always uphold the ART of UMi in all that you do.
- When you see an opportunity to do so, use your skill, experience, and personal characteristics to support projects and activities outside of your core role.
- Be an advocate of UMi through active involvement in promotional and marketing activity and through broader networking and introductions.
- Uphold our commitment to people, planet and profit by consistently operating to UMi's policies, standards and ethics.
- Project targets are achieved OTIF, facilitating the completion of customer investment applications, completing enhanced due diligence/AML checks to protect funds and mitigate risk and assess subsequent claims for funding.
- Provide exceptional customer service, engage empathetically with customers, and respond to their needs. Assess requirements, and articulate appropriate products/services using all channels. Ensure all activities/interactions are recorded in an accurate and timely manner.
- Undertake detailed discussions with client to assess eligibility around complex business issues, understand business challenges, and confirm eligibility against scheme requirements.
- Effective diary management and scheduling of appointments for Advisers.
- Support development and maintenance of clear work instructions.
- Undertake administration duties including reception management and any ad-hoc requirements. Manage, prioritise own workload and duties as required in line with a rota for telephone / webchat / email enquiries.

THE ART OF UMi

Our values and beliefs

- **Adventurous** – our adventures take us far and wide – they're tough and exciting but we are fearless and open-minded about where they might lead.
- **Responsible** – we share a collective responsibility to each other, respect the world we live in, and we keep our promises.
- **Togetherness** - We can achieve more together than we can apart, and we know that businesses are more than just bricks and mortar or numbers on a spreadsheet – they're powered by people.

YOUR ROLE WITHIN UMI

- Team: Public Sector Services
- Your Manager: Service and Investment Team Leader
- Reports: Service and Investment Executives

THE ESSENTIAL THINGS YOU NEED

- Basic educational standard (GCSE) to high standard including Maths and English.
- Track record of delivering excellent customer service.
- Good communication skills (written and verbal), including ability to effectively listen to interpret customer requirements.
- Confidence to question and challenge.
- ICT Literacy with competence in Microsoft Office packages.
- Able to demonstrate an understanding of business processes and business acumen.
- High level of analytical ability to assess customer needs, information and documentation.
- Demonstration of basic sales techniques to reach decision makers and gain commitment.
- Ability to organise own workload and self-motivate to achieve targets.
- Ability to adapt pace to react to changing circumstances to ensure an efficient operation, coupled with accuracy and a methodical approach.

THE THINGS THAT ARE NICE TO HAVE

- Previous experience working in a customer facing / service organisation.
- Demonstrable understanding of the use of questioning and basic sales techniques to identify and understand customer requirements.
- Ability to complete due diligence / Anti-Money Laundering checks, assessing risks and making informed decisions.
- Understanding of publicly funded programme requirements such as European Regional Development Fund (ERDF).
- Experience of using a Customer Relationship Management database.
- Ability to interpret basic business financial information.
- Understanding of applying a risk-based approach and experience of when to escalate unusual scenarios and behaviours.
- A demonstrable understanding of corporate structures and the ability to advice on KYC/CDD requirements.

YOUR SIGNATURE

MANAGER'S SIGNATURE