

BUSINESS AND INVESTMENT ADVISER

Job Description

Team: Technology and Investment

Purpose of job:

This post is part funded by European Regional Development Fund (ERDF) as part of the 2014-2020 European Structural and Investment Fund Programme

To assist businesses to access grant schemes administered by UMi, working closely with the Project Manager and Investment Centre Director in the overall delivery of the project. Undertaking client interface to advise and assist eligible customers in accessing the funds, ensuring that valid claims are defrayed within SLAs.

Scope of job – main responsibilities:

- The role holder will promote and deliver advisory support on the Tees Valley Business funds to clients through telephone and face to face visits.
- Advising on eligibility and access to the Tees Valley Business Funds, reviewing in detail customer applications into the funds including detailed financial annexes as part of the application.
- Dealing with customer enquiries and signposting customer effectively to alternative areas of support where projects are ineligible.
- Checking and processing grant claims from SME beneficiaries.
- Monitoring approved projects.

Customer engagement

- Work proactively to engage eligible customers in the Tees Valley Business Funds.
- Establish professional and valued relationships with customers and intermediaries for the Tees Valley Business Funds.
- Ensure customer activities and actions are documented appropriately within the CRM (where applicable) and customers are clear on next steps.

- Ensure that the actions resulting from visits are completed in line with customer expectations and ERDF evidence requirements.
- Act as an ambassador of UMi to promote awareness of the group's business support service portfolio and the Tees Valley Business Funds in particular.

Establishing projects eligibility

- Identify clients that are likely to provide good projects and encourage and guide on the application process
- Review Expressions of Interest
- Review in detail customer applications in relation to scheme and state aid eligibility
- Liaise with customers to obtain clarification and challenge as appropriate their project information including state aid and requirements such as "additionality" and "displacement"
- Analyse information provided by the customer and provide feedback to the Project Manager

Project support

- Prepare applications for presentation to the Tees Valley Business Funds Investment Panel
- Attend Investment Panel meetings and present applications
- Action feedback on applications as a result of decisions taken at Investment Panel meetings
- Review due diligence appraisal reports and make recommendations for final approval to the Panel
- Draft and agree client offer letters
- Assess and process individual grant claims
- Review system-based applications and claims in line with scheme limits
- Provide ongoing monitoring of individual client projects
- Provide general support to monitor progress and support the achievement of client projects on a national basis

Service excellence

- Support and engage in all organisational standards ensuring delivery of service excellence
- Ensure compliance with all grant scheme requirements
- Manage workflow effectively, responding to customer demand as appropriate and without compromising UMi's reputation

- Make appropriate arrangements and preparation for customer meetings
- Deliver individual targets and objectives in line with business requirements as agreed with Project Manager
- Comply with all UMi business processes, protocols, policies and work instructions, particular ERDF regulations and requirements
- Where applicable, ensure all activities are recorded onto the customer relationship management system (CRM) in accordance with operational standards and processes
- Achieve and maintain quality standards associated with the role in line with business and grant scheme requirements
- Ensure customers are aware of their grant funded support and it is publicised appropriately, in accordance with ERDF regulations

Position within the organisation

- The role reports to the Investment Centre Senior Project Manager within the Contracts Business Unit. There are no roles reporting into this role
- The role will require considerable face to face communication with external customers, stakeholders and with key delivery partners. It will also require presentation to the Tees Valley Business Funds Investment Panel and close liaison with internal colleagues across the business

Dimensions and limits of authority

- The role has no budget responsibility
- The role requires decisions to be made as to the most appropriate service solution to be offered to customers, following a diagnosis of customer needs and requirements
- The role will require decisions around customer engagement on the basis of grant scheme and state aid eligibility
- Decisions which may require a deviation from standard procedures, or which are perceived to present a risk to the business, relationship or self, should be referred to the Tees Valley Business Funds Project Manager
- Office and mobile working requires the role holder to manage their time and workload, in line with their work commitments and those allocated from others (e.g. Service and Investment Executive)

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

- Business acumen and commercial understanding gained through experience from within business situations, functions and key processes
- Recent experience of providing advice to businesses on accessing funding or investment support
- Educated to NVQ Level 3/A Level or above
- A self-starter with initiative, drive and the ability to work with minimal supervision
- Experience of working with business customers on a face to face basis
- Knowledge and experience for reviewing and commenting on business plans including financial forecasts and the viability of the plans
- Ability to interpret the financial health and viability of a business using management accounts and other financial information
- Proven ability to evaluate business needs and identify and advise on appropriate solutions
- Experience of reviewing in detail customer applications for investment and making decisions on eligibility and suitability for funding
- Competent used of CRM systems, Excel, Word, PowerPoint, e-mail and ability to readily learn to use new ICT packages
- Current driving licence and ability to fulfil transport requirements of post

Summary of knowledge, skills and experience - desirable

- Understanding and experience of current grant schemes and their applications practically in supporting businesses to grow
- Political, organisational and environmental awareness
- Ability to work effectively with a wide range of senior representatives both internal and external to the company
- Knowledge of the broad range of business support initiatives
- Knowledge and understanding of public and private business support organisations

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.