

# SENIOR PROJECT ADVISER

## Job Description

**Team:** Technology and Investment

### Purpose of job:

- This post is part-funded by ERDF as part of the 2014-2020 European Structural and Investment Fund Programme.
- The Senior Project Adviser will lead and manage a team of Project Advisers while also performing the role of a Project Adviser.
- The Senior Project Adviser will be responsible for ensuring accurate completion of CRM records and will work with the Senior Projects Manager to prepare financial and performance information and reports for monthly ERDF reports and claims.
- The Senior Project Adviser will support the Senior Projects Manager with team development and continuous improvement, to ensure that the necessary ERDF skills, knowledge and expertise are maintained.
- The role will see the Senior Project Adviser working with colleagues and external stakeholders to significantly increase engagement with SMEs and promote the take-up of local and national business support programmes, leading to the creation of jobs in Gateshead, South Tyneside and Sunderland.

### Scope of job – main responsibilities:

- The following responsibilities are underpinned by the provision of support and assistance across the Team in a flexible manner, in keeping with the needs of the business.
- This role will be based at Spectrum 6, Spectrum Business Park, Seaham, SR7 7TT with mobile duties across the North East region.

## Project Adviser team management

- Set and provide clear direction on the company's mission, vision, aims and objectives, leading by example at all times.
- Take responsibility for ensuring the adherence of the company values and behaviours within the team.
- Manage the employment process, from recruitment through to termination, in line with HR policies and procedures, ensuring fairness of access and opportunity to all.
- Ensure performance is effectively managed and issues are addressed in a timely and appropriate manner.
- Develop people with the right skills, knowledge, attitudes, and behaviours to operate to their full potential.
- Ensure that the necessary ERDF skills, knowledge and expertise are maintained in the team at all times.
- Involve people when contributing to the business plan and agreeing team and individual KPIs/SMART objectives.
- Support employees' health and wellbeing and maintenance of a good work-life balance.
- Ensure efficient workflow by directing and guiding the work of others within team and across functions as appropriate.
- Recognise and value people's individual contribution to the company.

## Customer engagement

- Actively engage with businesses, partners and intermediaries in the North East region.
- Identify a portfolio of companies to work with, which will include visits, identification of projects, interventions and follow up.
- Establish professional and valued relationships with customers through regular close contact account management which will include regular face to face meetings, telephone and email communication.
- Ensure actions resulting from visits are documented and shared with customers.
- Monitor the delivery and impact of the assistance with the customer and identify further assistance as appropriate.
- Establish credibility within the business community at large, and with the businesses they work with, to enhance trust and develop positive working relationships that lead to tangible business growth.
- Engage with the company management teams agreeing bespoke development plans to support their growth activities.
- Maintain complete and accurate records of company engagements, referrals and outcomes achieved.

- Prioritise activity in relation to individual work planning, the requirements of the portfolio of companies and the activities of the team.
- Ensure appropriate sharing of information about companies with colleagues and partners.
- Reporting on progress as appropriate including assisting with the preparation of claims to public sector funding bodies. Develop and promote relationships with external partner organisations including Gateshead Council, South Tyneside Council, Sunderland Council, the North East LEP and Growth Hub, The North East Fund, NECC, Universities, Centres of Excellence and other delivery organisations.
- Take company referrals from and refer to partner organisations, ensuring effective follow-up of all actions.
- Lead and assist as appropriate the organisation of events and other profile-raising activities.

## **Establishing business needs**

- Undertake a detailed diagnostic that qualifies barriers to growth and identifies growth opportunities. Valid reasons must be recorded where physical meetings are replaced with telephone or virtual/electronic meetings, e.g. Skype.
- Analyse information provided by the customer to put in place a growth road map for each customer that will help the business to recognise what support they need to activate growth as quickly as possible, and in line with the aspirations of the business interpret the needs of the business.
- Incorporate the customer requirements and priorities into an Action Plan.
- Update the CRM with required data/information and ensure the customer story is clear, with all documents attached in accordance with Team protocol.

## **Facilitate solutions**

- Evaluate options available which will assist in bringing about positive change to the customer's business.
- Provide advice on an appropriate range of solutions, including the Growth Fund grants, coaching the customer to ensure the most fit for purpose solution is identified.
- Provide advice and impartially broker in the appropriate business solution(s) to customers where appropriate.
- Identify which solutions have the potential to be supported through the ERDF project.
- Ensure up to date understanding of other regional and national funding and support solutions available, especially those that are funded by ERDF.
- Network with local businesses to encourage and enable peer support.

- Ensure the customers understand the importance of reporting impacts resulting from the support received and support the subsequent collection and recording of impacts.

## **Service excellence**

- Support and engage in all organisational standards ensuring delivery of service excellence.
- Ensure compliance with all ERDF and other contractual requirements.
- Manage workflow effectively, responding to customer demand as appropriate and without compromising UMi's reputation.
- Maintain own programme of continuing personal development relating to own activities and the activities of the Team as a whole.
- Make appropriate arrangements and preparation for customer meetings.
- Deliver individual targets and objectives in line with business requirements as agreed with Line Manager.
- Comply with all UMi business processes, protocols and work instructions.
- 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 ERDF requirements.
- Ensure customers are aware of their ERDF funded support.

## **Project management activities**

- Take responsibility for ensuring accurate completion of CRM records and will work with the Senior Projects Manager to prepare financial and performance information and reports for monthly ERDF reports and claims.
- Support the Senior Projects Manager with team development and continuous improvement, to ensure that the necessary ERDF skills, knowledge and expertise are maintained.

## **Position within the Organisation**

- The role reports to a Senior Project Manager within the Investment and Technology Team.
- The role is responsible for the line management of the Project Advisers.

## **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 ERDF project 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 Senior Project Manager.
- 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**

- Proven leadership qualities and experience of managing a small team.
- Ability to develop business networks.
- Educated to graduate level or equivalent demonstrable level of knowledge.
- Ability to demonstrate business knowledge across a broad mix of business sectors and processes.

- Knowledge of key business processes and ability to analyse and diagnose strategic and operational business needs.
- Ability to interpret the financial health of a business using accounts and other financial information.
- Proven competence to communicate with and influence senior management within SME businesses.
- A proven track record of supporting SME business growth on a face to face basis.
- The capability to assess complex business issues, appraising factors which influence company's planning and decision making and demonstrate initiative by providing bespoke solutions to clients.
- Strong Self-motivation and a 'can do-attitude' with a focus on achieving personal targets and prioritising workload to achieve.
- The ability to build rapport and develop sustained relationships with senior management based on credibility and trust.
- Be sufficiently organised and flexible to manage several ongoing tasks.
- The ability to adapt personal consultancy style to deal with a range of clients.
- Attention to details to maintain complete, accurate and up-to-date records of client contacts and follow up.
- Ability to prepare professional customer communications and documents.
- 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**

- Potential specialist expertise in areas that are considered to be important to business growth in the area.
- Ability to demonstrate existing business networks in the area plus a knowledge of the support available to businesses in the area.
- Knowledge of the North East economy including economic drivers, opportunities and threats
- Experience of delivering ERDF funded business support programmes.
- Experience of business mentoring/counselling.
- Up to date appreciation and understanding of the issues facing the local, regional and national business community.
- Political, organisational and environmental awareness.
- Knowledge of the broad range of business support initiatives.

**Job holder signature:**

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**Line manager signature:**

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| COMPETENCY AND BEHAVIOURS                     | ONE OF THE TEAM   | SETTING AN EXAMPLE   | STANDING OUT FROM THE CROWD  |
|---|---|--|--|
| <b>DECISIVENESS</b>                           | 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.   |
| <b>BUILDING &amp; ENHANCING RELATIONSHIPS</b> | 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.          |
| <b>ORGANISATIONAL AWARENESS</b>               | 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.  |
| <b>DEVELOPING SELF AND OTHERS</b>             | 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. |
| <b>COMMUNICATION &amp; INFLUENCING</b>        | 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.   |
| <b>PLANNING &amp; DRIVE FOR ACHIEVEMENT</b>   | 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.  |