



# SERVICE AND INVESTMENT EXECUTIVE

## Job Description

**Team:** Investment and Technology

### Purpose of job:

- To provide exceptional service to customers across a range of products/services within UMi through a multitude of channels. 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.

### Scope of job – main responsibilities:

- Underpinning all of the responsibilities is the role of providing support and assistance across the Investment and Technology Business Unit, with an expectation of flexibility in undertaking responsibilities in keeping with the needs of the business.

### Provision of exceptional customer service

- Achieve and maintain quality standards associated through the various stages of the customer journey and the role, in line with business requirements
- Proactive lead generation and demand stimulation, taking ownership of data and opportunities as part of marketing and driving demand campaigns
- Undertake the appropriate research of a customer's business, prior to contact, in order to introduce and promote services to both new and existing customers
- Articulate services and assess customer requirements, sourcing appropriate services to match their needs
- Handle Inbound, email/web based enquires, taking ownership to bring all enquiries to a resolution
- Ensure a comprehensive understanding of the variety of services and their unique requirements to effectively deliver services which are appropriate for the needs of individual customers

- Effective diary management and booking of appointments for field advisers, making appropriate arrangements and preparations to enhance the customer experience
- Assess customers eligibility across a range of services or investment funds, making effective decisions on the services they receive
- Facilitate the completion of customer investment applications and subsequent claims for funding
- Ongoing review of customer progress, developing supportive relationships with customers to assist them in progressing through their customer journey
- Effectively collect customer impacts resulting from services received

## **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
- 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
- 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
- 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
- Undertake administration duties including post distribution, maintenance of the Investment and Technology Business Unit consumable stores, issuing of customer documentation, and other associated administration
- Manage and prioritise own workload and provide duties as required in line with a rota for telephone / email enquiries

## **Support achievement of contracts and UMi objectives**

- Promote a culture of continuous improvement, to reduce costs, maximise efficiency and KPI performance
- Identify and support development of opportunities to deliver new or enhances services to customers
- Cross sell and promote the wider UMi services
- Deliver services in line with requirements and SLA's agreed with other Business Units

- Provide UMi reception services, meeting and greeting customers and suppliers, whilst ensuring the effective management of the reception area
- Provide support cover as appropriate to other Business Units in delivery of services to their customers
- Active and proactive participation in wider company projects to ensure continuous improvement in working practices

## **Position within the organisation**

- The role reports to the Service and Investment Manager
- The role will require extensive communication with external customers, and internal liaison with colleagues throughout UMi

## **Dimensions and limits of authority**

- There is no financial budget responsibility although the role holder may authorise customer investment decisions of up to £5K or greater at the discretion of the Service and Investment Manager
- Decisions will need to be made on a daily basis on the appropriate service provision for customers based on eligibility and identified needs

## **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
- Track record of delivering excellent customer service
- Good communication skills (written and verbal), including ability to effectively listen to interpret customer requirements
- 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

## Summary of knowledge, skills and experience - desirable

- 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
- Understanding of publicly funded programme requirements such as European Regional Development Fund (ERDF)
- Ability to interpret basic business financial information
- Experience of using a Customer Relationship Manager database

## Job holder signature:

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## Line manager signature:

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<b>COMPETENCY AND BEHAVIOURS</b>	<b>ONE OF THE TEAM</b>	<b>SETTING AN EXAMPLE</b>	<b>STANDING OUT FROM THE CROWD</b>
<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.