

BUSINESS FUNDING EXECUTIVE

Salary Group	Senior Technical/Functional Manager
Why your role is important	<p>Your role is a vital part of UMi's Get Funding team, where we are committed to delivering outstanding support to customers across a wide range of funding products and services. You'll engage with businesses through multiple channels, helping them navigate their funding journey with confidence.</p> <p>You'll play a fundamental role in assessing customer needs, coordinating the right support, and guiding them toward the most suitable solutions.</p>

MAIN RESPONSIBILITIES AND KPI'S

- Always uphold the ART of UMi in all that you do and ensure full adherence to expected behaviours and conduct.
- 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.
- Provide clear, comprehensive guidance on funding readiness, barriers for businesses to accessing finance including initial fact finding and introduction to UMi's Sat Nav tools to prepare for Funding Clinic appointments.
- Take ownership of progressing cases on time and in full (OTIF), by actively supporting the preparation of complete and accurate case files for lender review.
- Support the development of customer feedback and guidance plans to improve funding readiness, ensuring businesses understand next steps and are equipped to move forward.
- Attend events and networking opportunities to support external business development and raise awareness of the Get Funding service.
- Maintain regular contact with customers and referral partners, supporting relationship management and continuity of service.
- Provide proactive administrative and operational support to the Get Funding team and advisers, including diary management, appointment scheduling, and service coordination, to ensure efficient delivery of funding support to SMEs.
- Maintain accurate and timely records of all case-related activity in line with internal policies, FCA regulations, and data protection standards.
- Provide control and oversight of Dynamics CRM usage, ensuring lead booking processes are followed and customer data is captured, maintained, and managed to the highest standards.
- Support development and maintenance of clear work instructions.

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: Get Funding.
- Your Manager: Service & Investment Team Leader (reporting duties to Chief Funding Solutions Officer).
- Reports: N/A

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.
- Previous experience and understanding in the assessment of lending, grants or equity funding for businesses.
- 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.
- 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	