



Customer Services Professional

Job Description

Who We're Looking For

An employee to be the voice of Benchmark Capital, providing professional helpful responses with all query resolutions to internal and external customers, accurately and timely. In addition, processing key back office tasks, working closely with all departments within Fusion.

About Benchmark Capital

Benchmark Capital powers financial advisers through insight and integrated tools, services and investment solutions that help them differentiate their client proposition.

Helping advisers to look after their clients is at the centre of everything we do. Our award-winning solutions support over 150 advice firms, with £17.1 billion of assets under advice¹

With a technology-led ecosystem of regulatory, platform, and investment services, and our own financial planning business, our approach is guided by delivering safety and security for customers and focused on positive client outcomes.

We believe that first-class client service and integrated technology are essential components for long-term success. Our seamless, holistic approach works in harmony both to empower advisers and their clients and to generate tangible financial and competitive advantages.

We work with some of the most successful financial planning firms in the UK, bringing the power of technology to advice and wealth management

¹As at 31.03.21

The base

You'll be based at our Broadlands Business Campus near Horsham in West Sussex. It has high standards and international reputation, without being in the city: a big, countryside campus means life will feel a little different.

We support our offices by using cutting edge software and hardware and our spacious campus facilities mean there's a great working environment for the team. With an on-site restaurant, coffee shop and gym, our campus has much to offer. And commuters can relax on our dedicated regular shuttle bus to and from Horsham's main line train station.

We know that helping you balance personal and professional commitments is a big part of that, so we're open to flexible working. Many of our staff work flexibly in many different ways, including part-time. Please talk to us at interview about the flexibility you need.

What You'll Do

- First point of contact for queries from Financial Advisors and/End consumers via phone/email/tickets
- Understanding and confidently articulating multiple processes in both written and verbal format; specific to KYC (Know Your Customer) & Due Diligence, SLA reporting, Client MI Transactions and Support & Issue Resolution.
- Answer customer queries in accordance with processes and procedures
- Absolute ownership of queries through to satisfactory resolution
- Gain and maintain a good understanding of Platforms within the Financial Services market
- Follow procedures and instructions in order to ensure excellent client outcomes
- Source answers and think logically to find solutions
- Review data to ensure accuracy
- Proactive feedback to other departments where required in order to ensure excellent client outcomes
- Contribute and feedback in team meetings
- Maintain and Improve Customer Satisfaction Survey Results vs targeted SLA's

The Knowledge, Experience and Qualifications You Need

- Excellent phone manner and experience of dealing with challenging calls
- 5 GCSE's including maths and English language
- 2 A Levels or equivalent
- Willing to learn
- Accurate with good attention to detail
- Ability to work as part of a team and autonomously
- Excellent communication skills both written and oral
- Organised and diligent
- Build rapport quickly and easily

The Knowledge, Experience and Qualifications That Will Help

- Financial Services industry experience
- Confident user of Microsoft Word and Microsoft Excel

What You'll Be Like

- Self-starter, willing to learn
- Ability to adapt communication according to the audience
- Ability to prioritise work
- Confidence to ask questions and suggest process improvements
- Embraces change positively
- Able to work efficiently and accurately in a fast-paced environment
- Enthusiasm, energy and positivity

We're Looking for The Best, Whoever They Are

Benchmark Capital is an equal opportunities employer. You're welcome here whatever your socio-economic background, race, sex, gender identity, sexual orientation, religious belief, age or disability.

Grading:

Grade	Competency Level	Experience/What success looks like
1	Starter/Beginner	<ul style="list-style-type: none"> • 3 – 6 months training alongside practical/on-the-job training • Work and learn across all areas of Benchmark Capital Client Services. • Fair understanding of applicable processes and procedures within Client Services • Supervised for tickets/enquiries within Client Services and Support • Skills and aptitudes are required such as will provide a basic to fair understanding of straightforward issues.
2	Competent	<ul style="list-style-type: none"> • Self-starting • Ability to prioritise own workload and work unsupervised • Attend refresher and annual training • Understanding and ability to work in a minimum of 2 teams / areas. • Good understanding of all applicable processes and procedures within Client Services. • Skills and aptitudes are required such as will provide a fair to good understanding of straightforward issues.
3	Competent +	<ul style="list-style-type: none"> • Self-starting • Manage own workload and prioritisation • Seeking work and able to support across all areas of operations administration • Buddy for new members of Administration • Internally recognised Subject Matter Expert for Client Services • Excellent understanding of applicable processes and procedures within Client Services. • Positive feedback and complimented by customers • Skills and aptitudes are required as such will provide the ability to address a range of issues, some of which may be difficult.

Important Information: Issued by Benchmark Capital Limited, Broadlands Business Campus, Langhurstwood Road, Horsham, West Sussex, RH12 4QP. Registration in England No 09404621.