

Client Services Professional

Job Description

Reporting To:	Client Services Manager
Responsibility for Others:	None
Location:	Horsham, Broadlands
Hours of Work:	Monday to Friday 9.00am to 5.30pm with 1 hour for lunch
Any Special Requirements:	None
Grading:	1 – 3

Overall Purpose of the Job:

To be the voice of Fusion, 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.

Key Activities & Responsibilities:

- 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

Required Skills/Experience:

- 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

Desirable Skills/Experience:

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

Personal characteristics:

- 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

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 operations • 100% supervised for Platform Controls team work • 100% supervised for 3rd party work • 100% supervised / checked for funding / exceptions work
2	Competent	<ul style="list-style-type: none"> • Self-starting • Ability to prioritise own workload and work unsupervised • 100% checks for funding and exceptions word • Attend refresher and annual training • Understanding and ability to work in a minimum of 2 teams / areas. • Skills and aptitudes such as will provide the ability to address a range of fairly 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 at least one area of administration • 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.