



## Job Description

<b>Job Role</b>	<b>Client Relationship Manager</b>
<b>Reports to</b>	<b>Business Support &amp; Office Manager</b>
<b>Division</b>	<b>Jelf Employee Benefits</b>
<b>Segment</b>	<b>Group Pensions</b>

### Purpose of the job

To maximise business opportunities by providing relationship management and comprehensive support to the JEB Consultants for new and existing Group Pension Schemes.

### What we expect you to do

1. Perform a client relationship role involving regular contact with our key clients and their HR departments.
2. Use information about the scheme and the client relationship to maximise scheme membership including ad hoc client and site visits.
3. Provide support to the JEB Consultants on both pre and post-sale business as required, to ensure continued professional service is provided at all times to clients.
4. Oversee annual renewal activity, including the production of Annual Review Reports, liaising with team and the client to ensure this is delivered effectively.
5. Ensure all records, including 1<sup>st</sup> software, are accurately and regularly maintained.
6. Ensure client files are maintained in a professional manner in line with company procedures.
7. Ensure all work is properly diarised and regularly chased as necessary in order to meet specified deadlines.
8. Liaise with clients, insurers and other departments of The Jelf Group.
9. Carry out research and project work as required by Manager and Consultants.

### Qualifications

	<b>Essential</b>	<b>Desirable</b>
Professional	-	CFP or equivalent
Maths and English GCSE or equivalent	Grade C or above	-
Driving Licence - Car	Yes	-

### How we expect you to behave

#### Professional

Your actions are considered and thoughtful and you deliver on time.

#### Effort

You approach tasks with energy and enthusiasm. You are proactive and positive in dealing with work matters and others. You take ownership for matters involving your allocated clients and endeavour to solve problems promptly and effectively.

<b>Team</b> You display flexibility and are adaptable when the need requires. You endeavour to personally develop your skills. You act as a conduit between the Team and the Consultants.
<b>Integrity</b> You keep promises and respect information and data with due discretion and confidentiality. You conduct yourself with honesty and concern for others.
<b>Group competencies – skill areas and how you apply them</b>
<b>Concern for Excellence</b> <ul style="list-style-type: none"> <li>• Activates the highest standards of performance</li> <li>• Faces every challenge with a “can do” attitude</li> <li>• Committed to the achievement and maintenance of quality and accuracy</li> <li>• Committed to exceeding client expectations and proactively implements methods to improve performance</li> <li>• Receptive to new ideas and positive change</li> <li>• Keen to take on additional responsibility to develop own skills/knowledge and to assist others</li> <li>• Awareness of TCF initiative and compliance guidelines with a proactive attitude to attaining both</li> <li>• Commitment to maintaining client relationships and demonstrating professionalism.</li> </ul>
<b>Planning, Organising and Delivering</b> <ul style="list-style-type: none"> <li>• Demonstrates ability to prioritise own workload to accomplish goals and targets, including an awareness of client needs and priorities</li> <li>• Works on own initiative to identify issues, define problems and implement solutions</li> <li>• Focuses energy and resources on tasks that add value to a) own role and b) the team</li> <li>• Demonstrates ability to comply with processes and procedures as directed</li> <li>• Actively maintains compliant and accurate records</li> <li>• Owns effective practical methods to manage workload and can (as a result) access resources and locate information efficiently</li> <li>• Acts on requests within agreed timescales</li> </ul>
<b>Communication</b> <ul style="list-style-type: none"> <li>• Communicates relevant information (both written and verbal) in a concise and effective way</li> <li>• Meets deadlines and communicates information to others in a timely manner</li> <li>• Produces accurate written communication to clients and shows ability to adapt format to client</li> <li>• Readily contributes to the team meeting environment</li> <li>• Establishes and effectively communicates a course of action to accomplish own goals and objectives (including the proactive update of T&amp;C file and review records)</li> <li>• Establishes and effectively communicates a course of action to accomplish team goals (including the contribution of suggestions to benefit the team, coupled with a desire to take ownership and see suggestions through to delivery/conclusion)</li> <li>• Demonstrates professional and effective relationships with insurers which gain desired outcomes</li> </ul>
<b>Personal impact and team effectiveness</b> <ul style="list-style-type: none"> <li>• Interacts with others in an effective and sensitive way</li> <li>• Uses correct channels to escalate issues and obtain information</li> <li>• Respects and appreciates the needs of and works well with others and demonstrates an awareness of team objectives/aims</li> <li>• Maintains effective work behaviour in the face of setbacks or pressure. Remains calm, stable and in control of themselves</li> <li>• Is dependable, flexible and punctual and takes a positive attitude to challenges</li> <li>• Is willing to share knowledge with others and take an active role in training others</li> <li>• Responds positively to training and to suggestions/advice from peers and superiors</li> <li>• Is positive and professional when working with colleagues and when introduced to clients/representing the Group on business</li> <li>• Takes ownership and responsibility for the outcome of all work undertaken</li> </ul>

- Proactively participates in internal meetings

## **Divisional competencies – skill areas and how to apply them**

### **Client Service**

Client management	<ul style="list-style-type: none"> <li>• Ensures that client requests and needs are satisfied responsively</li> <li>• Looks for ways to improve service and build a rapport with clients</li> <li>• Keeps promises made to client/consultant/team</li> </ul>
Handling objections	<ul style="list-style-type: none"> <li>• Recognises dissatisfaction and deals with this swiftly by referring to Line Manager</li> </ul>
Telephone/questioning techniques	<ul style="list-style-type: none"> <li>• Demonstrates a confident, polite and professional telephone manner</li> <li>• An ability to establish details with client through questioning and to communicate messages clearly</li> </ul>
Letter and report writing	<ul style="list-style-type: none"> <li>• Is conversant with all letters and templates in use by the team/on the system</li> <li>• Can write a non-standard letter</li> </ul>

### **Sales**

Jelf Group proposition	<ul style="list-style-type: none"> <li>• Has an understanding of the Group wide services and products</li> </ul>
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### **IT skills**

1 <sup>st</sup> Software (Advisor Office)	<ul style="list-style-type: none"> <li>• Excellent practical knowledge of all aspects of the processes for managing clients and records</li> <li>• Understand the data quality requirements for the Group</li> <li>• Know where to find and how to interpret data relevant to the role</li> </ul>
Outlook	<ul style="list-style-type: none"> <li>• Intermediate user</li> </ul>
Word	<ul style="list-style-type: none"> <li>• Intermediate user</li> </ul>
Excel	<ul style="list-style-type: none"> <li>• Intermediate user</li> </ul>
PowerPoint	<ul style="list-style-type: none"> <li>• Basic/beginner</li> </ul>
Internet	<ul style="list-style-type: none"> <li>• Intermediate user</li> </ul>
Goldmine (if relevant)	<ul style="list-style-type: none"> <li>• As defined by the Group</li> </ul>

### **Technical competency**

Administration procedures	To have sufficient technical knowledge to complete your role to the required standards.
Products	
Compliance	
Claims (if applicable)	
Market knowledge	

### **Personal authority**

Expenses	None – refer to line manager
Complaints and redress	No authority
Signing	No authority to sign any legal, agency or supplier contracts
Commission income	No authority
Fee income	No authority to set fee levels
Administration charges	No authority to waive or change charges as set out by the division
Writing off debts	No authority