



JOB TITLE: Consultant Support (Employee Services)

DATE: October 2024

REPORTS TO: Support Team Line Manager/Supervisor/Team Manager

LINE MANAGER: N/A

PURPOSE OF ROLE

- To undertake a lead support role to the Employee Services Consultants and Directors to ensure clients receive a consistent high level of service and support
- To ensure that client records are up to date and that internal systems and processes are followed
- To broaden knowledge and experience across the breadth of employee services to fully support consultants
- Support and develop junior team members to enable them to be as efficient and effective as possible

KEY RESPONSIBILITIES

- Ensure a clear audit trail is maintained for all client records
- Ensure timely and accurate delivery of employee services scheme processing
- Provide administrative support for new, existing and complex schemes
- Manage Auto-Enrolment compliance for all pension schemes
- Manage annual renewal and market reviews for all existing group risk/SME schemes
- Prioritise and process claims and keep client and consultant up to date with progress
- Ensure bespoke compliance documents are accurate and up to date
- Process monthly payments, ensuring that the contributions are correct
- Organise and prepare for client governance and pre-renewal meetings
- Complete follow-up actions from client meetings in line with instructions from consultant, liaising with both client, insurer and pension provider as required
- Check and issue policy documentation
- Assist clients with the implementation of Employee Assistance programmes
- Prepare Employee Announcement Letters for new and existing schemes
- Keep Corporate Spreadsheet up to date
- Draft proposition documents, reports and presentations for consultants
- Provide feedback to consultants, keeping them up to date
- Ensure IO is up to date and opportunities are added and maintained regularly and correctly, in consultation with the Employee Services Consultant/Director
- Liaise with consultants and clients to ensure all contractual obligations are fulfilled
- Support, train and develop junior team members to enable them to undertake tasks that will benefit the team and ultimately the client
- Undertake project activity to ensure the efficient running of the office e.g. streamlining processes and documents, create framework for checking work, ensure templates/documents are correct and in the right place, workflow management.
- Maintain and update my talent development record, via the Beckett Academy App, ensuring my objectives are up to date and impact of any training is recorded

PERSON SPECIFICATION

	<i>ESSENTIAL</i>	<i>DESIRABLE</i>
QUALIFICATIONS	<ul style="list-style-type: none">• R01 Regulation and Ethics• GR1 Group Risk	<ul style="list-style-type: none">• R04 Pension and Retirement Planning• Progressing towards the Diploma in insurance
EXPERIENCE	<ul style="list-style-type: none">• Good understanding of Becketts' systems and processes for ES• Providing accurate and timely administration support	<ul style="list-style-type: none">• Training and Development of others
KNOWLEDGE	<ul style="list-style-type: none">• Mandatory compliance training group risk• Knowledge of pensions and group risk administration• Business protection• Insurer offers and systems• Pension provider systems	<ul style="list-style-type: none">• Knowledge of products and services Becketts advise on• IO
SKILLS & ABILITIES	<ul style="list-style-type: none">• Attention to detail/accuracy• Computer literate and data management• Analytical• Good organisation and prioritisation skills• Time management• Team working• Ability to build and maintain relationships• Communication – written and verbal• Ability to follow rules and procedures	<ul style="list-style-type: none">• Networking and building professional relationships
PERSONAL ATTRIBUTES	<ul style="list-style-type: none">• Behaving in a professional manner• Trust and integrity• Curiosity and willingness to learn and improve	<ul style="list-style-type: none">• Commercial awareness

KEY PERFORMANCE INDICATORS

- ✓ Accurate and timely information provided
- ✓ IO and Corporate Spreadsheet accurate and up to date
- ✓ Building client relationships
- ✓ Client satisfaction and zero complaints
- ✓ Positive feedback from clients and colleagues
- ✓ Adherence to procedures
- ✓ Task management (diary)

MAIN CHALLENGES OF THE ROLE

- Manage the volume and prioritisation of work
- Delivering a higher standard of service than competitors to retain clients and exceed the expectations of new clients

SIGNATURE

I agree to the above description of my responsibilities.

JOB HOLDER:

Signature:

Print Name:

Date:
