



# BECKETT

## FINANCIAL SERVICES



**JOB TITLE:** Senior Consultant Support (Employee Services) **DATE:** 1 April 2023

**REPORTS TO:** Team Manager

**LINE MANAGER:** N/A

### PURPOSE OF ROLE

- To undertake a senior lead support role to the Employee Benefits Consultants and Directors to ensure clients receive a consistent high level of service and support
- To coach and develop Employee Benefits team members to ensure delivery of a high-quality employee benefits service to clients
- To ensure that client records are up to date and that internal systems and processes are followed consistently by all team members

### KEY RESPONSIBILITIES

- Deliver a proactive high quality support service to Consultants and Directors, assisting with urgent and technical problem-solving where necessary
- Liaise with clients, dealing with their queries and ensuring all client correspondence is clear and accurate
- Liaison with providers, Consultants, Directors and clients ensuring a full audit history of information is maintained
- Keep Consultants, Directors up to date with progress and manage any issues that may arise, escalating any concerns or complaints as necessary. Hold regular review meetings with Consultants, Directors to discuss priorities and any issues arising
- Prioritise new business enquiries and obtain quotations, draft proposition documents, reports and fee agreements in a timely manner and generate template suitability letters and complete the free type sections where possible
- Ensure all tasks, advice flows, market review analysis sheets, scheme specs, GPP comparisons and pension scheme specs are kept up to date noting in all areas, the attention to detail required for these documents
- Monitor and prepare for Consultants, Directors, Annual Governance Meetings, Pre-Renewal Meetings or PMI Fact Find meetings in a timely manner ensuring all documents are available to review at least 48 hours prior to meeting date.
- Organise Consultant's diaries and book client meeting where necessary
- Where required, attend meetings and take meeting notes, record all actions required and complete or allocate as required
- Ensure meeting notes are delivered promptly and within 2 weeks of the meeting to ensure compliance with KPIs, update planner review where necessary
- Understand more complex client needs such as TUPE, Acquisitions, Takeovers and Mergers.
- Maintain and update client platforms where appropriate ensuring latest products and features are represented
- Request renewal quotations and chase insurers accordingly to ensure market reviews are completed in a timely manner.
- Prioritise and process claims and keep clients and consultants up to date with progress

- Ensure Corporate Spreadsheet and/or IO are kept up to date, reviewing regularly. Add opportunities and check progress regularly to ensure they reflect the correct stage.
- Request, check and issue fees in a timely manner
- Ensure all client instructions are dealt with and Consultants, Directors are kept informed. Ensure all contractual obligations are fulfilled, such as certification, re-enrolment, group risk renewals etc.
- Coach and develop team members to enable them to undertake tasks that will benefit the team and ultimately the client, escalating any concerns to their line manager / Team Manager.
- 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
- Ensure compliance with legislation, rules and procedures at all times, to be a role model for Employee Benefits and behave in a professional manner at all times
- 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>
<b>QUALIFICATIONS</b>	<ul style="list-style-type: none"> <li>• R01, GR1, R04</li> <li>• Other qualifications as appropriate</li> <li>• Active CPD</li> <li>• Becketts mandatory compliance training</li> </ul>	<ul style="list-style-type: none"> <li>• Working towards diploma</li> <li>• Management qualification or relevant training</li> </ul>
<b>EXPERIENCE</b>	<ul style="list-style-type: none"> <li>• Good understanding of Becketts' systems and processes for EB</li> <li>• Providing accurate and timely administration support across all disciplines</li> <li>• Report writing</li> <li>• Experience of dealing with a number of high-level technical queries</li> </ul>	<ul style="list-style-type: none"> <li>• Development of others</li> <li>• Experience of dealing with the most complex and challenging situations</li> </ul>
<b>KNOWLEDGE</b>	<ul style="list-style-type: none"> <li>• Mandatory compliance training</li> <li>• Knowledge of pensions, group risk and business protection, group pensions administration, automatic enrolment duties, group life, group income protection and group critical illness schemes and employee assistance programmes</li> <li>• Insurer offers</li> <li>• Pension provider systems</li> </ul>	<ul style="list-style-type: none"> <li>• Sharing knowledge and best practise with others</li> <li>• Understanding of providers and resolving issues</li> </ul>
<b>SKILLS &amp; ABILITIES</b>	<ul style="list-style-type: none"> <li>• Attention to detail/accuracy</li> <li>• Computer literate and data management</li> <li>• Excellent organisational and prioritisation skills</li> <li>• Time management</li> <li>• Ability to follow rules and procedures</li> <li>• Analytical</li> <li>• Ability to build and maintain relationships</li> <li>• Communication – written and verbal</li> </ul>	<ul style="list-style-type: none"> <li>• Leadership skills: motivating and inspiring others; team building; coaching and mentoring; strategic thinking; creativity and innovation</li> <li>• Excellent report writing and presentation skills</li> <li>• Decision-making and problem solving</li> </ul>

**PERSONAL  
ATTRIBUTES**

- Behaving in a professional manner
- Trust and integrity
- Curiosity and willingness to learn and continuously improve
- Commercial awareness
- Communicating with emotional intelligence
- Communicating under pressure
- Effective writing
- Expressing yourself
- Assertive
- Presenting data and information with confidence
- Ability to communicate complex information in a simple way

**KEY PERFORMANCE INDICATORS**

- ✓ Accurate information provided
- ✓ Accurate and up to date information provided to client, consultants and EB reporting systems
- ✓ Corporate Spreadsheet and IO accurate and up to date
- ✓ Staff retention
- ✓ Client satisfaction and zero complaints
- ✓ Positive feedback from colleagues
- ✓ Adherence to procedures
- ✓ CPD logged and maintained and to be relevant to personal development plan and technical needs
- ✓ 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
- Investing time and energy with individual members of staff and teams to retain Becketts' family ethos culture and retain staff

**SIGNATURE**

I agree to the above description of my responsibilities.

***JOB HOLDER:***

Signature:

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Print Name:

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Date:

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