

## JOB SUMMARY - CLIENT MANAGEMENT TEAM LEADER

Client Management Consultants serve as the front line of Curtis Banks. They are expected to resolve client queries on a first-time basis where possible. Individuals will be responsible and accountable for playing a leading role in improving our services.

The role of the Client Management Team Leader is to take overall responsibility for and ensure the smooth running of the Client Management team, ensuring SLAs are met and quality is maintained.

Principal accountabilities:

- Supporting colleagues in the team in resolving queries and answering communications from clients and advisers through verbal and written communication methods.
- Acting as the primary escalation point for the team, resolving any concerns or summarising and reporting forwards where necessary.
- Ensuring that client deadlines and service standards are met within the team.
- Ensuring that any task activity in team is accurately completed to the service standards set by the Company, including DPA conformance and other team outputs.
- Actively developing individuals within the team through active monitoring, feedback and other methods encouraged by the business.
- Acting as direct line manager for Client Management Consultants
- Proactively identifies risk within the department and escalates concerns to Department Manager.
- To fulfil any other reasonable requirement of the department or Curtis Banks Ltd.

Knowledge, skills and experience required:

- Demonstrates excellent telephone and written communication skills and an ability to effectively communicate well with colleagues as well as external parties.
- Able to deal with escalations relating to the whole SIPP lifecycle and manage expectations of external and internal parties in line with Company procedures and SLA's, supporting team members as required.
- Strong organisational skills and an ability to manage multiple tasks in addition to supporting the wider team and department.
- To possess an excellent working knowledge of the Curtis Banks products, the fee structure, key features and terms and conditions.
- Possesses a good working knowledge of self-administered pension schemes and the SIPP lifecycle processes
- Experience working within a team at a senior position or above.

The ideal candidate would have a minimum of 2 years prior proven experience of working within a pensions environment and experience in a people management role is preferable. Knowledge, skills and experience will be assessed on joining and gaps will be identified so that suitable training can be given. The applicants must possess a high degree of interpersonal skills and be able to prioritise workloads on a daily basis to accord with the Company's service levels.

A full job description is available on request.

This is a full time vacancy

Office hours are: 9.00am - 5.30pm Monday to Thursday & 9.00am - 5.00pm Friday (37 hours)

Start date: Immediately

Duration: Permanent

Location: Bristol

## JOB SUMMARY - KEY ACCOUNT MANAGER

All candidates will be asked to confirm their eligibility to work in the UK at interview stage and to provide evidence of it on appointment. Please note that successful candidates will be subject to a criminal records and personal credit check.

How to apply: Please send your CV, along with a brief covering email to - [recruit@curtisbanks.co.uk](mailto:recruit@curtisbanks.co.uk)