fidelius.

Corporate Client Executive

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Function	Employee Benefits
Reports to	Employee Benefits Team Leader
Line Reports	None
Purpose of Role	To provide administration support to the Corporate Financial Planner and assist the team with duties. Striving to build stronger relationships with a bank of clients and adding value.

Key responsibilities

1. **Customer Service**
    - Point of contact for all incoming calls and emails from our clients, product providers and Corporate Financial Planners.
    - Responding to internal/external requests via email and phone in a prompt and efficient manner, keeping all parties informed of progress as appropriate.
    - Working with the Corporate Financial Planner and Client Service Manager to ensure that all clients are receiving the service they are paying for and expect from Fidelius.
    - Suggest where efficiencies and improvements could be made.
    - Strive to build on the existing client relationship and identify additional upselling opportunities.
    - Work with the client to keep confidential employee data and requests up to date.

2. **Employee Benefits Administration**
    - Build strong, professional, lasting relationships with Fidelius clients, Corporate Financial Planners and your colleagues.
    - Act as on-going support for all Fidelius EB Clients and keep Corporate Financial Planner and Clients regularly updated on the progress of outstanding cases and dealing with any technical queries.
    - To actively manage existing schemes for Pensions and Health, Risk and Wellbeing (HRW) ensuring details are kept in line with FCA guidelines and maintaining service standards.
    - Process all new business ensuring all transactions are tracked through to accurate and timely completion, ensuring compliance filing and application set up with providers is carried out, in line with our service propositions.
    - Undertake all new scheme implementation for both Pensions and HRW, including preparing client invitation packs, attending client meetings, setting up the scheme with the provider.
    - Maintain all client data for all schemes in a timely and efficient manner and prioritise workloads effectively.
    - Maintain scheme membership changes including addresses, leavers, contributions,

salaries and claims.

- Undertake member data requests for scheme renewals within service standards and carry out all relevant requests for quotes with providers
- Assist Corporate Financial Planner with recommendation reports and workforce assessments
- Follow a strict procedure for each transaction making sure all CRM systems are up to date at all times.
- Look for efficiencies in existing processes, making suggestions that the team would benefit from.

3. Data Management

- Ensure all data is requested and captured in an efficient and timely manner.
- Regularly check data, fill gaps and amends errors where necessary.
- Ensure all account records are checked and updated upon receipt of any correspondence via email and telephone.
- Continually monitor scheme records, ensuring that accurate data can be produced when required. Identify potential gaps in clients needs and communicate this to the Corporate Financial Planner.
- Record all client activity, including telephone calls, emails etc., on the CRM system including time recording to ensure that an accurate and complete audit trail is available at any time.
- Follow process and procedure ensuring every task is completed in the same compliant manner.
- Processing payroll data, this can include uploading to a number of third party systems.

4. Office Duties and Post Distribution

- Provide administration support in the form of scanning, printing, filing, photocopying, binding, record keeping, data imputing and typing or any other duty needed.
- The occasional arrangement/receipt of couriers, and the subsequent recording and forwarding on to the appropriate recipient.
- Answering calls in a professional manner, transferring where necessary elsewhere in the business.
- Processing ad hoc and regular invoices. This will include checking the invoiced work has been carried out and documented.

5. Service Standards and Processes

- Ensure that all tasks are completed within agreed service standards and every effort is made to exceed these wherever possible.
- Follow processes and understand how they impact on the quality of service provided to our clients. Document work at every stage.
- Do your very best to continually assess each service standard and process. Discuss and agree improvements with your line manager.

6. **Team Working**
    - Build strong working relationships with the Employee Benefits team and wider business.
    - Assist your colleagues during periods of absence and holidays.
    - Actively take part in team meetings.
    - Adopt a can do approach when other members of the Team need assistance to ensure service standards are met.

7. **Compliance**
    - Treat all data with complete confidentiality and take reasonable stapes to protect this at all times.
    - Treat our customers fairly at all times, referring to your Line Manager or Compliance Manager for guidance if necessary.
    - Act in accordance with compliance procedures and FCA Regulations at all times to ensure regulatory requirements and company policies are not breached.
    - Maintain client records and update client information on CRM systems to keep an effective audit trail.

Knowledge, Skills and Competencies

- Full time role.
- Hybrid role – minimum of two days working in the Bath or Cheltenham office.
- Ability to travel to other office locations if required.

- Good working knowledge of Microsoft Office including Word, Excel, Outlook and PowerPoint.
- Experience working in an administration role
- Experience of delivering accurate, relevant and timely information.
- Good communication skills.

Desirable:

- Experience working in a Pensions or Employee Benefits administration role.
- Experience working with Auto Enrolment schemes.
- Experience of using Intelligent Office back-office system.
- Experience of working in a relationship management role.

Our Ways of Working

Accountable

- Takes ownership and accountability for their actions and tasks.
- Steps outside of comfort zone to learn and develop.
- Organised and efficient, manages their own time effectively and prioritises to maximise productivity.
- Keeps promises and delivers what they say they will.

Collaborative

- Is inclusive, respectful and supportive of others.
- Listens and takes on-board the views of others.
- Communicates in a timely and effective manner for the best outcomes.
- Shares knowledge and experiences to improve results.

Inquisitive

- Seeks opportunities to create efficiency and improve ways of working.
- Appropriately challenges ways of working.
- Willing to understand different ways of working in different teams.
- Confidently and constructively questions processes.

Transparent

- Honest and trustworthy, treating everyone with respect.
- Straightforward with communication.
- Clear and concise with others at all times.

Aware

- Is aware of the impact of their own actions, styles and behaviours on others.
- Gives support, praise and feedback to others in a constructive manner and receives feedback or challenge graciously and with an open mind.
- Reflects on feedback received to develop themselves.

Adaptable

- Embraces and positively endorses change, finding ways to support the situation.
- Demonstrates flexibility where priorities or deliverables need to change and takes responsibility for continuous review.
- Adopts a flexible approach to projects, tasks and others.

Determined

- Has a can-do attitude.
- Takes responsibility for their own development.
- Copes effectively under pressure.
- Delivers on promises, expectations, roles and responsibilities.