Employee Benefits Administrator

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Employee Benefits Administrator

Function	Employee Benefits
Reports to	Employee Benefits Team Leader
Line Reports	None
Purpose of Role	To provide administration support to the Employee Benefits Consultants and assist the team with day-to-day client administration, whilst delivering excellent service.

Key responsibilities

1. **Customer Service**
    - Point of contact for all incoming calls and emails from our clients, product providers and Employee Benefits Consultant.
    - All correspondence coming in and out of the department is to be professional and friendly.
    - Uploading emails and phone notes as they are received.
    - 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 entire Employee Benefits team to ensure that all clients receive excellent service at all times.
    - Work with the Employee Benefits Consultants and Employee Benefits Team Leader to ensure that all clients are receiving the service they are paying for and expect from Fidelius.

2. **Employee Benefits Administration**

    - Build strong, professional, lasting relationships with Fidelius clients, Employee Benefit Consultants and your colleagues.
    - Complete data requests in a compliant manner.
    - Make sure CRM records are up to date and managed.
    - Request data from providers as and when required.
    - Keep the providers contact list for the team up to date.
    - Produce reports when required for the Employee Benefit Consultants, this could be collating information from our shared client files or requesting the information from providers.
    - Process new business applications on third party sites, this will be for pension schemes including The Peoples Partnership amongst others.
    - Email clients to let them know schemes are now set up and the next steps. 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.
    - Make sure our transactional clients are emailed on a regular basis.
    - Maintain all client data for all schemes in a timely and efficient manner and prioritise workloads effectively.

- Carry out basic tasks including updating of addresses for clients with providers.
- Complete invoicing weekly for ad hoc and regular clients. This includes making sure evidence is on file for the work having been carried out.
- Complete checks to make sure documents are filed correctly. If this is not the case, then remedial action to be completed.
- Upload emails correctly, making sure they are titled and added to the correct contracts.
- Manage the group mailboxes and ask for assistance in allocating work where required.

3. **Data Management**
   - Ensure all data is captured and entered accurately onto the CRM system.
   - 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.
   - 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.
   - Creating renewal tasks on a monthly basis including invoices due.

4. **Office Duties & 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.
   - Responsible for the opening, scanning (where appropriate) and distribution of incoming post in a timely manner.
   - Accepting deliveries and distributing to the relevant person.
   - The collation and sorting of outgoing post for collection.
   - The occasional arrangement/receipt of couriers, and the subsequent recording and forwarding on to the appropriate recipient.
   - Printing client information as required by the Employee Benefits Consultants.
   - Ensuring fund switch requests are sent on to the correct provider on the day of receipt.
   - Undertake any relevant ad hoc activities in support of EB Team.

5. **Service Standards & Process**
   - 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.

6. **Team Working**
   - Build strong working relationships with the Employee Benefits team and wider business.
   - Assist your colleagues during periods of absence and holidays.
   - Participate in team meetings when required.
   - 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 steps to protect this at all times.

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- 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 back office systems to keep an effective audit trail.

Knowledge, Skills and Competencies

- Full time role – Bath or Cheltenham based.
- Good working knowledge of Microsoft Office including Word, Excel, Outlook and PowerPoint
- Previous experience working in an administration role within a fast-paced environment.
- Experience of delivering accurate, relevant and timely information.
- Experience of working and communicating with others in a team environment.

Desirable

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

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