Central Team Supervisor

Function	Client Services
Reports to	Client Services Manager
Line Reports	Up to 15
Purpose of Role	Provide supervisory support to Central Team Leader for a team of administrators, managing workflow to ensure adherence to team service levels. Taking a proactive role in ensuring the delivery of high-quality service to our clients, offering training, support and guidance on processes while actively pursuing continuous improvement. Working closely with the wider client service leaders ensuring good communication and collaboration.

Key responsibilities

1. Team Supervision

- Oversee day-to-day supervision of the administration team, ensuring client service delivery and alignment to the company values and ways of working.
- Support with workflow distribution to ensure balanced workloads across the team and consistency in achieving service goals.
- Conduct regular team and 1-1 meetings to assess both individual and team achievements, identifying training requirements and process improvements.
- Conduct team and individual training, build training frameworks and source resources for both new hires and experienced team members.
- Coach and mentor team members to achieve individual and team goals and work efficiently, while supporting their development.
- Develop and carry out audits and checks, using data to track and assess both individual and team performance in relation to client service benchmarks and KPIs. Deliver actionable feedback to encourage best practice and consistency.
- Provide guidance and support to the administration team on process queries.
- Oversee team leave to maintain optimal support levels, always ensuring adequate cover.
- Support the Team Leader in recruitment and all employee relations matters.

2. Client Service Delivery

- Work collaboratively with all departments to ensure client service goals are met and client requests are processed promptly and professionally.
- Ensure all tasks by the administration team or personally are completed promptly and accurately.
- Ensure that all client instructions and new business submissions are processed precisely and within established service level agreements (SLAs), fully supporting our Right First-Time objective; ensuring all transactions are monitored through to an accurate and timely

completion.
- Ensure clients and adviser teams receive progress reports/updates at regular intervals when dealing with lengthy transactions.

3. Continuous Improvement and Change

- Take a proactive approach in reviewing team processes and ways of working to support the achievement of service levels.
- Utilise data information reports to assess and audit team performance, pinpointing areas for process and skills improvement.
- Approach change constructively and demonstrate best practices by encouraging the team to adopt new and innovative working methods.
- Assist the Leadership team in meeting organisational objectives.
- Foster strong companywide relationships, exemplifying Company values and behaviours across all business interactions.
- Participate in or support projects relevant to the role or the Client Service Team as required.

4. Compliance

- Treat all data with complete confidentiality and take reasonable steps to protect this at all times.
- Always treat our customers fairly, referring to your Line Manager or the Head of Compliance 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

- Comprehensive understanding of the client journey, evidenced by 12–18 months' experience within a client service team or equivalent external experience with comparable skills.
- Some background in training, coaching, and/or mentoring colleagues.
- Adept at delivering training sessions, providing constructive feedback, and conducting audit checks.
- Proficient in Intelliflo back-office system.
- Skilled in processing client instructions, executing platform trades, and generating iO portfolio reports.
- Strong working knowledge of Microsoft Office Suite, including Word, Excel, Outlook, and PowerPoint.
- Proven ability to deliver accurate, relevant, and timely information. Experienced in adapting to and operating effectively within dynamic and evolving environment

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