

## JOB SUMMARY - KEY ACCOUNTS TEAM LEADER

Key Account Managers provide an essential role in the management of our SIPP's. They are responsible for handling the clients and financial advisers which have been assigned to them in all aspects of SIPP operations. They represent the company in Key Account relationships. As the main point of contact for allocated relationships, Account Managers are expected to work with the functional areas of the business to ensure instructions are carried out effectively.

The role of the Key Accounts Team Leader is to take overall responsibility for and ensure the smooth running of a team of Account Managers, ensuring SLAs are met and quality is maintained.

Principal accountabilities:

- Acting as a high level contact for Key Account relationships, working with the Account Manager(s) to support and develop these firms.
- Acting as the primary escalation point for the team, resolving any concerns or summarising and reporting forwards where necessary.
- Work with Sales team to integrate new relationships and responsible for oversight of larger book moves into the business.
- Working with other areas of the business on development ideas and opportunities to enhance Key Account relationships.
- Ensuring any process or business changes are communicated appropriately and the impact of changes is adapted into department processes.
- Attending clients meetings as and when required and leading these interactions.
- 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.
- Providing input on technical issues.
- Acting as direct line manager for Account Managers
- 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 delegate tasks within teams.
- Strong time management skills and comfortable working in a fast paced environment.
- 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 decision making abilities and comfortable to handle escalations in line with Company procedures.
- To possess an excellent working knowledge of the Curtis Banks products and lifecycle processes, the fee structure, key features and terms and conditions.
- Comfortable attending face to face meetings with external parties.
- 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 or relationship management role. 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.

## JOB SUMMARY - KEY ACCOUNT MANAGER

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

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)