

ASSISTANT ADMINISTRATOR

JOB DESCRIPTION

2020



About Curtis Banks

We are a leading provider and administrator of self-invested personal pensions (SIPPs), part of Curtis Banks Group PLC. Our office in Ipswich is based in Princes Street, just a 5 minute walk from the railway station. Our employees are a mix of all ages and we have a vibrant, fun culture that extends outside the workplace.

We offer a fantastic benefits package, including a generous pension scheme, flexible working, study support to help develop your qualifications and early close on Fridays to name but a few. For more details about us visit Curtisbanks.co.uk or find us on LinkedIn and Facebook.

Job title:	Assistant Administrator	Version date:	2021
Full/Part Time:	Full Time	Salary range:	Depending on experience
Business area:	Operations Department	Job family:	Customer Service
Reporting to:	Head of SIPP Operations / Head of Operations Services	Location	Ipswich

Purpose

This role within our Operations department will be required to perform a range of administrative tasks within the team.

The successful candidate will possess excellent communication skills, good attention to detail and be a team player.

Responsibilities:

- Interact with customers via both telephone and in writing, politely and efficiently in order to convey a positive image of the business and to build customer loyalty and enhance customer relations
- Respond to customer enquiries via both telephone and in writing, ensuring that the enquiry is fully understood and to provide information in order to satisfy customer needs
- To ensure a high level of quality and accuracy is maintained, delivering excellent service for all of our customers.
- Undertake and perform a range of straight forward transactions associated with customers such that all transactions are made accurately and promptly.
- Complete customer based information and feedback (e.g. letters, paper files) such that customer records are complete and fully up to date.
- Generate standard correspondence relating to customer queries and ensure that these are dispatched to customers on time and within any relevant service level agreement (SLA).
- Understand and apply all proves controls (eg. Money laundering, data protection) in order to ensure all activity in the role is fully compliant with requirements.

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- Identify and recommend improvements to current working practices within own team.
- Responding to day to day compliance queries from the department.
- Undertake preliminary assessments of information, documents and requirements including sourcing information, technical inputs and other research, then make or take the related decisions within delegated level of authority.

Qualifications

- 5 GCSE's (or equivalent at grades A-C (or equivalent) to include English and Maths (essential)
- To obtain the Life and Pensions Foundation Certificate (or equivalent) within 12 - 18 months.

Knowledge

- Basic knowledge and understanding of industry and regulatory requirements. (Desirable)
- Basic systems navigation skills (including Microsoft packages). (Essential)
- Basic understanding of the customer lifecycle. (Desirable)
- Knowledge of operational functions and processes. (Desirable)

Skills and Experience

- Ability to communicate effectively both verbally and in writing. (Essential)
- Good people and interpersonal skills to build up effective relationships at all levels internally and externally. (Essential)
- Ability to plan own workload to meet business requirements and service level agreements. (Desirable)
- Ability to work well and keep calm under pressure. (Essential)
- Ability to understand the needs of our customers and be focused around customer outcomes. (Essential)
- Relevant work experience. (Desirable)

Treating customers fairly

- Understand the commitments that are made about the level of service during the marketing and sales processes to ensure the area is capable of meeting those expectations
- Consider the needs of the particular target markets for products and tailor the service proposition to meet those needs effectively
- Ensure customers are provided with relevant information at appropriate times throughout the life of products to enable them to manage their reasonable expectations regarding the potential future benefits available
- Ensure customers have sufficient information to enable them to understand when advice may be required and, where appropriate, ensure customers have access to suitably qualified advisers
- Analyse feedback from all sources to ensure that customers' reasonable expectations of performance and service are met and where failings are identified, provide information to relevant areas to enable changes to be made
- Organise and manage the provision of service to give sufficient priority and opportunity to customers wishing to change product, switch provider, submit a claim or make a complaint

Working for Curtis Banks has never been so rewarding...

- Everyone receives a generous salary, fantastic holiday benefits and the opportunity to take part in our Sharesave Scheme.
- Amazing Pension contributions from the business
- Length of service Awards
- Benefits scheme that includes discounts from shops, gyms etc.