



### **Role Profile**

Client Resources Manager

### **Location**

Gloucester, GL3 4AH

### **Salary**

£35,000 per annum

### **Contract Type**

Permanent / Full-Time

Blackfinch Group is an award-winning investment specialist with a heritage dating back over 25 years. A trusted provider, we work in partnership with advisers. Our businesses offer tax-efficient solutions, early stage investing, managed portfolio services, property financing and renewable energy. As an environmental, social and governance (ESG) investor, we work for a positive impact. We're proud to be entrusted with over £450 million in assets under management and administration.



## Purpose of Role

The Client Resources team has an essential role in delivering support and excellent service to advisers, clients, and other teams across the business. Alongside championing excellent service standards, you will demonstrate a high level of technical knowledge of all Blackfinch products and the wider environment in which Blackfinch sits.

You are responsible for leading and managing the Client Resources, ensuring delivery of effective and accurate pre-sales support and post-sales administration of all Blackfinch products. Fostering and engendering a professional environment for the Client Resources team to thrive to solve problems, you will ensure this leads to increased client satisfaction and ultimately leading to an increase in sales. Mentoring and coaching the team, you will ensure their thorough understanding of all processes, our products and influencing legislative framework so that performance and output is continually improved upon.

## Key Accountabilities

As a Client Resources Manager, your responsibilities will include:

- Oversees all aspects of the client journey (pre and post sales) reviewing processes and procedures to ensure continual improvement in the service we provide to our clients.
- Implements and manages effective processes for the Client Resources team to ensure they interact with clients and customers through a variety of mediums (phone, email, zoom) in order to offer a best of breed service.
- Role-models best practice when handling sensitive customer service issues.
- Monitors and reviews processes for ways to make procedures more time and cost-effective.
- Produce relevant KPIs and report on a regular basis to the wider business.
- Conduct regular 121's and annual CDRs with team members, ensuring objective setting and their review engenders a highly motivated team driven to achieve exceptional service delivery standards.
- Responsible for department recruitment and implementation of retention and positive performance management strategies to enable our talented individuals to realise their career aspirations with the firm.
- Work closely with the Sales team, to understand their priorities, such as illustrations to ensure collegiate and collaborative support is provided.
- Ensure that the team is 'compliant' at all times and that all Client Resourcing processes and procedures support compliance and the confidentiality of client personnel information and financial data.

## Skills & Qualifications

To be a successful Client Resources Manager you will hold a degree 2:1 or equivalent professional qualification. You will possess excellent communication and interpersonal skills and be extremely accurate with an eye for detail. In addition, demonstrable organisation skills are key for this role. Previous experience in a professional services environment, whilst desirable, is not essential.

You will be self-motivated and tenacious with a strong and flexible work ethic, a good working knowledge of all Microsoft programs as well as the ability to use database and CRM systems. To be successful you will thrive on developing your knowledge and will be passionate about studying through internal and external training and qualifications to learn more about our industry and products. You will either hold or be willing to work towards a relevant industry qualification such as CF1/RO1.

For talented individuals who are seeking to realise their career ambitions with us, we will actively support your knowledge growth through working with our experts and develop your technical abilities through sponsorship of qualifications. For those who show exceptional desire to achieve, we offer career progression and opportunities to develop not only as technical managers but also as people managers.

If you believe you have the skills and experience for this role, we'd be interested to hear from you.

Apply by sending your CV and any other supporting documents to **HR@blackfinch.co.uk**

If you require any further information about this role, we're here to help, contact us on 01452 717070.

## Our Values

At Blackfinch we're working to make a difference in the world. We partner with advisers to meet client and business aims. Inspired by the work of Charles Darwin, we're named after one of Darwin's finches, which influenced his theories of evolution.

Our values of 'adapt', 'evolve' and 'thrive' run through everything we do. We continually adapt to changing markets, providing evolved products so that our customers can thrive. These values inform our work as an ESG investor, working towards a more sustainable future.



Offering a supportive environment, championing continuing professional development and sponsoring staff for qualifications.



One of the friendliest businesses in financial services, supporting our people, customers and investee companies.



Providing opportunities to progress plus to take up benefits, and to get involved in sponsorship and charity work

---