Job Description

Platform Relationship Manager

Purpose

To provide support to Wealth Managers and Advisers using the 7IM platform. The overall purpose of the role is to work with our clients to ensure that the 7IM platform is fully embedded into the office, processes and systems of an advisory firm to increase the efficiency of their business and hence enable our clients to deliver their desired service and proposition to their customers.

The role reports into the Platform team and must work closely with the Platform Service and Proposition team to keep informed of all platform knowledge. Simultaneously the role will work within the regional sales and relationship management team. The platform target is a subset of the regional target and hence the role holder will be required to work with their regional team to ensure that not only is the platform target met but that the entire regional target is achieved.

The role involves extensive face-to-face and direct telephone contact with wealth managers and advisers plus their office staff. The role holder will take primary responsibility for the accurate administration and growth of their client's business with 7IM.

This role will be based in our London office but it is expected that a large portion of the role holder's time will be spent face to face with our clients, usually in their offices; hence extensive travel will need to be undertaken.

Responsibilities

- Build relationships with Wealth Managers and train them to use the 7IM platform both face-to-face and on the telephone.
- Build an understanding of our clients business and promote additional 7IM services where appropriate.
- Support the Head of Platform Sales and Relationship management teams to win and embed new platform clients.
- Increasing the STP take up of the application process with clients.
- Upon delivery of new online and electronic functionality ensure the embedding and targeted usage is achieved.
- Receiving and ownership to completion of queries.
- Be the centre of platform knowledge in the regions, where required, training and support of the regional team in regards to the platform.
- Gather feedback from our clients for feeding back to the platform proposition and service team.
- Supporting of regional events and campaigns.
- Updating Wealth Managers on changes such as Corporate Actions.
- Taking responsibility to ensure all client and Wealth Manager communication is accurate, appropriate and delivered at the right time, including emails, letters and reports.
- Receiving telephone queries from Wealth Managers, escalating in a minority of cases where appropriate.
- Suggesting realistic appropriate improvements to the company systems and procedures to continually improve service to clients and Wealth Managers.
- Ensuring that the FCA policy of treating customers fairly is followed as well as working in accordance with 7IM's mission and tenets.
- Other tasks, as reasonably requested by your manager.
- Co-ordinating with the Platform Service managers to ensure that all work is prioritised and managed effectively in accordance with 7IM platform service agreement.

Skills

- Accuracy, thoroughness and attention to detail in order to maintain the highest levels of service

- Assertiveness and tenacity combined with diplomacy and sensitivity, to build and maintain good relationships with Wealth Managers, Advisers, firm office staff and colleagues across the 7IM company. The ability to drive through and ensure that necessary actions are taken to service the Wealth Managers, whilst maintaining positive relationships with them and within the company.
- Telephone answering, rapport and relationship building skills in order to rapidly establish a high level of trust with the Wealth Managers, to manage expectations, and to demonstrate a high level of ownership, competence, reliability and responsiveness.
- Ability to work within a regional team which includes both Discretionary Relationship Managers and Regional Relationship Managers. The team will work towards a shared set of targets.
- Accuracy, thoroughness and attention to detail in order to maintain the highest levels of service.
- Written skills in order to clearly, concisely and thoroughly present information to Wealth Managers.
- Numeracy skills to understand process and check a range of data.
- Planning and organising skills to maximise the efficiency of operation and service, including prioritising appropriately.
- Flexibility and innovation to handle and support changing (and sometimes conflicting) needs and demands, and continually to improve working practices.
- Personal development focus, taking responsibility for driving both personal and professional development in order to maximise effectiveness in this demanding role, and to grow with the role, and beyond.
- Be able to interact and work effectively with Platform Service managers to deliver outstanding service delivery to 7IM platform clients.

Knowledge

- In depth knowledge of the UK platform market, including the regulatory environment.
- Experience of retail investments and investment management (including operational knowledge) would be advantageous.
- Understanding of the advice process and advisory market in the UK.
- Relevant regulation and policy knowledge.
- Excellent working knowledge of e-business, especially in applications to Financial Advisers.
- Knowledge of the investment management industry is preferred.
- Knowledge of Pershing systems and procedures would be beneficial but not essential.

Qualifications

- Relevant Financial Services qualifications will be advantageous.

Other Relevant Information

- Role is regionally focussed but London office based hence extensive travel will be required, it is expected that on average three days per working week will be spent face to face with our clients.
- Flexible attitude to duties as the role evolves due to changes in the platform market and business focus.
- Flexible attitude to working hours – sometimes the workload will demand additional commitment outside the contractual hours.