

## Service Delivery Analyst – Norwich based

### Why is this role so important?

This is a great opportunity to join the Time4Advice (T4A) client services team and develop your career in software implementation & support and project management.

Implementing technology is challenging and involves the coordination of several moving parts. Given that our clients depend on technology for their successful day to day operations, it's essential that we implement it efficiently to achieve a positive outcome. Key to that is understanding what's required, coordinating people to maintain the plan and ensuring everyone knows what's happening and when. Managing all of that when plans inevitably go awry requires someone who is on the ball, highly organised and a great communicator.

### Role Purpose

As part of the Support Team, reporting to the Support Manager, this role is to facilitate and coordinate client implementations by directly supporting Implementation Consultants. From the point a new implementation commences, you will be a key point of contact for the client and all staff responsible for delivery of the agreed objectives.

You will use your expertise of the industry and CURO, together with your excellent organisation skills to support all aspects of delivery, ensuring record keeping is always kept up to date. This will also involve the proactive identification and resolution of trends and issues for these customers as you build relationships with them, which will also allow the continuous improvement of internal processes.

### What will the role entail?

On receipt of a signed Purchase Order, you will be informed that a new client has signed up and be provided with a link to their Otium project record.

**Once the initial project meeting has taken place**, you will work with the Implementation team to ensure the implementation documentation is set-up & distributed, including the issue of the CURO Subscription Agreement as early as possible.

**Supporting the customer and the Implementation team** during the onboarding phase by taking responsibility for the delivery of relevant objectives from the project plan. This will involve attending internal project steering meetings and client facing project calls.

**Throughout the implementation, taking your lead from the Implementation Consultant (IC) and using your own initiative**, you will maintain all onboarding records, including those that are shared with the client to ensure there is always 'one truth'.

**Ensuring the proactive delivery** of objectives within agreed time scales, including supporting the design and delivery of Business Units and Security roles for the client and their education around those areas

**You will play a key part in regular project meetings**, anticipating likely issues and dealing with all actions and issues assigned to you promptly. Where relevant you will escalate issues to internal teams, ensuring the client's expectations are always well managed.

**Championing client support issues** with internal and external stakeholders

**Reporting and tracking** requests & incidents through our ticketing system

**Collating & presenting ticket statistics** for customers and across customers to support the proactive identification of trends and likely issues, and to demonstrate team performance / support appropriate team resourcing

**In respect of specific project objectives agreed with clients**, you will be required to follow-up with the IC and communicate with Consultants/Trainers to ensure the project actions stay on track, to escalate issues and to deputise for the IC when required.

**You will be responsible for the organisation, collation and delivery of client feedback** to your line manager, escalating anything of concern as it arises. Where processes have not been clearly defined, you will support their definition and documentation proactively, promoting them to others as appropriate.

**Documenting and maintaining** specific practices and standards, as required

**Adhering to all Time4Advice Support standards**, processes, and procedures

**Providing online training** in response to customer 'how to' questions

**Following a successful go live event**, you will be responsible for supporting the client in the early days and weeks of their CURO adoption and for transitioning them to BAU support. This will include a full handover of agreed specs and documentation as relevant to the individual client

You will need excellent organisation, administrative and communication skills, a good understanding of how financial services firms operate and a genuine passion for technology and CRM. A high level of drive and commitment will be essential.

This is an extremely rewarding client facing role which will challenge your communication and organisational skills. Contribution to the development of robust procedures for implementation support will also form an important part of this role.

Occasional travel may be required.

Required Skills and Experience

- Significant customer service experience
- Financial services background and or a working knowledge of financial services software
- A strong desire to deliver service at the highest level and to go above and beyond for your customers
- A natural ability to think beyond the task at hand and to understand the bigger picture and deliver accordingly
- Possess a logical and enquiring mindset
- Demonstrable ability to work independently, with a willingness to expand your knowledge to better support changing workloads in the team
- Strong team-player tendencies are essential
- Demonstrable experience in administration and an understanding of the importance of good record keeping
- Ability to juggle multiple priorities while maintaining a positive attitude under pressure
- Ability to maintain confidentiality when dealing with proprietary information
- Strong ability to proactively identify and resolve issues
- Effective time management skills
- Ability to be flexible/adapt to change and work in a fast-paced environment
- Excellent communication skills essential
- Excellent relationship skills essential
- Excellent organisational skills essential
- Excellent computer skills and knowledge of Office 365
- Ability to work independently as well as part of a team

#### Beneficial Skills and Experience

- Knowledge of Dynamics CRM and 365 a distinct advantage
- Experience with Exchange Online (Office 365)
- Experience of working on multiple projects at the same time
- Full, clean driving licence

This is not an exhaustive list and you are required to be flexible in your approach to carrying out your duties that may change from time to time to reflect changes in the Company's circumstances. The Company therefore reserves the right to vary this job description in consultation with you.