



## Role Profile

**Role Title:** Senior Sales Support

**Department:** Sales

**Reports To:** Head of Sales Operations

### **Purpose of Role:**

To ensure the team undertake and manage the initial and ongoing due diligence process for our origination distribution partners, including company and broker set ups. Management the distribution of procuration fee payments to our panel partners and to provide administrative support as required. To ensure team undertake sales administration tasks to enable the sales team to deliver the best service to our distribution.

### **Key Accountabilities**

- Management of the end to end due diligence process for our origination distribution partners
- To effectively set up broker companies and individual brokers in line with policy
- Contribute to enhancements to due diligence policy and procedures
- Resolve issues identified with broker/broker company set ups
- Set up meetings and prepare MI packs for ongoing due diligence review meetings
- Attend and minute ongoing due diligence meetings
- Set up and maintain an effective record keeping system for all Due Diligence matters
- Management of the distribution of procuration fee payments for our panel partners, engaging all relevant internal and external stakeholders and executing payments in line with company policy
- Establish an excellent working relationship with all members of the Sales function
- Support and oversee team in delivering effective preparation and management of key partner events
- Management of distribution database and ensure we have up to date contact details for our distribution panels
- Maintain Sales Dashboard Regional data, ensuring data assigned to correct region and facilitating change requests from Head of Sales
- Preparation of events as required by Sales Team
- Provide testing support when new functionality/systems and processes are introduced
- Support the Head of Sales Operations/Sales/Commercial Director in any additional administration tasks required
- Take responsibility for personal development, identifying and pursuing opportunities where appropriate to maintain and develop skill

**Performance Behaviours:** Gets Results/ Organisation & Planning/ Ownership/ Focuses on the Customer/ Can Do Approach/ Values People



**Essential Skills/Qualifications:**

- Good communication & stakeholder management skills
- Excellent levels of attention to detail
- Ability to multi task to ensure SLA's are met
- Proactive team player
- Self-motivated and enthusiastic with drive to succeed and deliver results
- Time management skills

**Desirable Skills/Qualifications:**

- Word, Excel and PowerPoint skills
- Financial Services experience

**Our people embrace our values:**

**Fair** - We are open minded and make unbiased, consistent decisions.

**Accountable** - We take ownership of situations so that our customers experience efficiency.

**Customer first** - We understand what our customers want and build strong relationships.

**Transparent** - We communicate clearly and concisely, ensuring that we are open with information.