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| **Job Description** | Novations Administrator |
| Direct Line Manager | Membership & Marketing Director |
| Key Responsibilities | Performance Indicators |
| * Deal with any provider/member enquiries received within published turnaround times * Request agencies via stated company process * Upload agencies to Intelligent Office * Record agencies on firm spreadsheets * Assist with Novation process as per ASHL Group guidelines * Deal with any Novation enquiries received from Providers and Advisers * Liaise with advisers regarding novation process * Assist with production of Network and adviser authority letters * Assist with preparation of mail merge and issue to product providers * Send novation pack to all relevant providers * To provide administration support to the wider Membership team * Liaise with providers to complete application forms and register with new providers * Dispatch any outgoing post * To fully participate in and adhere to any performance management process the Company has in place, in a professional and constructive manner. * Understanding and Adherence with company TCF policy statement | * Statements entered correctly on the system within company time schedule * Queries dealt with efficiently until resolved * Accuracy of payment allocation * Feedback from ARs * Chase Providers where necessary * Notification of Novation completion received * Enquiries dealt with efficiently until resolved * Sorted and issued in a timely manner * Fully completed and deadlines met * Performance Reviews |
| Skills Requirements | Knowledge Requirements |
| * Ability to communicate effectively both verbally and in writing with Advisers, Product Providers and Management * Team Working skills * Good planning & organisational skills * Resourceful and ability to use own initiative * Self-motivated * Focussed on delivering an effective service | * Educated to GCSE grade C and above * Microsoft Office competent i.e. Word & Excel * Some industry knowledge preferred * Company knowledge |
| SM&CR Requirements | |
| * You must act with integrity. * You must act with due skill, care and diligence. * You must be open and cooperative with the FCA, the PRA and other regulators. * You must pay due regard to the interests of customers and treat them fairly. * You must observe proper standards of market conduct. | |