

Service Delivery Analyst (SDA) – Norwich based

Why is this role so important?

This is a great opportunity to join the Time4Advice (T4A) Client Engagement team and develop your career in the support of technical software implementation and project management.

If you don't already know, we're on a mission to disrupt the financial advice and wealth management technology market and become the leading FinTech provider within the industry. Working within the Client Engagement team, you will have a direct impact on us achieving our ambition.

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 and provide the technical support required at the right time in the right areas for our clients. Key to that is understanding the plan and scope of activity and staying up to date with product and Microsoft developments. Using your instinct, knowing when to question information, always documenting process and activity to secure a great user-experience, and being able to manage all of that in a busy and ever-changing environment requires someone who is on the ball, highly organised and a great communicator.

Role Purpose

As part of the Implementation Team, reporting to the Head of Implementation, this role is to facilitate 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 experience 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.

As a senior team member, with significant and deep experience and knowledge of CURO, you will use that experience to provide support to Service Desk and other colleagues as required.

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.

Using your in-depth knowledge of CURO and the Microsoft Power Platform:

You will work with the Implementations team and the Dev team to deploy CURO to the client's own Dynamics environment.

You will support the customer and the Implementation Consultant by taking responsibility for the delivery of relevant objectives from the project plan, which will involve attending internal project steering meetings and client facing project calls.

Via the attendance of those regular project meetings you will play a key part in, 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.

The provision of ongoing technical support for eServices implementation (valuations and remuneration), and the relevant Security Role/Business Unit approach will be your prime responsibilities. **Troubleshooting issues** will also be a key part of your daily routine.

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

You will champion client implementation issues with internal and external stakeholders, **reporting and tracking** requests & incidents through our ticketing system.

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

You may also be required to provide online training in response to customer 'how to' questions related to implementation activity.

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.

Where processes or client facing information has not been clearly defined, you will proactively support their definition and documentation, promoting them to others as appropriate.

Based on your CURO and Power Platform knowledge you should expect to support business projects by offering technical guidance and expertise related to apps, gap analysis, and the ongoing maintenance and design of internal systems.

You will adhere to all Time4Advice standards, processes, and procedures.

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 will also form an important part of this role.

Required Skills and Experience

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.

- Significant customer service experience
- Financial services background and or a working knowledge of financial services software
- Strong analytical skills to proactively identify and resolve issues swiftly and efficiently
- A leaning towards the more technical side of implementation and client engagement and delivery
- 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
- 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 Power Platform a distinct advantage
- Experience with Exchange Online (Office 365)
- Experience of working on multiple projects at the same time
- Full, clean driving licence

Travel and Flexibility Requirements

Occasional travel may be required.

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.