

# Role Profile

## Part A - Grade & Structure Information

<b>Job Family Code</b>	<b>12BF</b>	<b>Role Title</b>	<b>Customer Relationship Manager</b>
<b>Grade</b>	<b>PS12</b>	<b>Reports to (role title)</b>	<b>Lead Pensions Manager</b>
		<b>Directorate</b>	<b>Resources</b>
<b>JE Band</b>	<b>519-613</b>	<b>Service</b>	<b>Business Operations</b>
		<b>Team</b>	<b>Pension Administration Service</b>
		<b>Date Role Profile was created</b>	<b>Nov-19</b>

## Part B - Job Family Description

The below profile describes the general nature of work performed at this level as set out in the job family. It is not intended to be a detailed list of all duties and responsibilities which may be required. The role will be further defined by annual objectives, which will be developed with the role holder. The Council reserves the right to review and amend the job families on a regular basis.

<b>Role Purpose</b> including key outputs	<p>The Customer Relationship Manager (CRM) is responsible for owning the relationship with key pension fund partners/clients, retaining customers and building reputation and maximising new business opportunities within the Orbis Administration Service.</p> <p>The role needs to see the CRM lead and develop relationships with Fund Officers, Local Pension Boards and Pension Fund Committees of Pension Funds administered by the Orbis Partnership.</p> <p>The nurturing of close partnerships, understanding Fund priorities and objectives so the Pensions Administration Team can effectively plan and deliver to requirements.</p> <p>The post holder will be responsible for managing fund account plans, maintaining both parties adhere to commercial controls within the contracts and developing/executing customer service improvement plans in collaboration with operational team leaders and senior managers.</p> <p>The job holder acts as the principal contact representing the voice of the customer and establishes close working relationships with internal and external key stakeholders representing the Orbis Pension Service.</p> <p>Engaging with key senior customers and obtaining invaluable insight into their needs and developing services to meet them.</p>
<b>Work Context</b>	<p>This is a key client facing role, representing and owning the reputation of the Pension Service across the ORBIS partnership in Surrey, East Sussex and London Boroughs. The role of the CRM will proactively manage expectations, communicate plans and promote the achievements of the service.</p> <p>The CRM will support the Pension Administration Team, ensuring escalation and governance is followed and a commercial management of contracts and agreements. To establish a professional culture of risk management and regulatory compliance. To be a thought leader in the development and delivery of LGPS benefits and service delivery.</p> <p>The role is proactive in engaging with key senior customers and planning face to face meetings at a strategic level. Responding to customer needs on a timely basis and being available as a first point of contact for escalation.</p> <p>Writing and delivering presentations to both internal and external audiences</p> <p>Postholder will be required to travel around the county and wider Orbis offices, to meet the demands of the role.</p>
<b>Line management responsibility</b>	May have line management responsibility
<b>Budget responsibility</b>	Accountable for contract management and retaining business relationships in excess of £2m.
<b>Representative Accountabilities</b> Typical accountabilities in roles at this level in this job family	<p>Analysis, Reporting &amp; Documentation</p> <ul style="list-style-type: none"> <li>Identify issues, trends and opportunities that may have an impact in their area of responsibility to enable appropriate action to be taken.</li> <li>Lead the development of policy in the own area of specialism, contributing to the delivery of organisational objectives.</li> </ul> <p>Customer Service &amp; Support</p> <ul style="list-style-type: none"> <li>Evaluate existing service provision taking account of feedback and broader external developments, to ensure innovative solutions are proposed to maximise service quality, efficiency and continuity.</li> <li>Apply specialist expertise and use judgement to make decisions where solutions are not obvious, to deliver services that meet customer requirements and service standards.</li> <li>Drive change and embed new ways of working to ensure high quality service delivery and value for money.</li> </ul> <p>Planning &amp; Organising</p> <ul style="list-style-type: none"> <li>Develop and ensure implementation of operational plans and play a key role in the formulation of strategic longer term plans for the area to fit broader functional and council strategy.</li> <li>Lead major projects and reviews and represent the business area in internal and/or external initiatives to enhance reputation and service delivery.</li> </ul> <p>Finance/Resource Management</p> <ul style="list-style-type: none"> <li>Manage allocated budget/resources/funding effectively and flexibly and control all related expenditure to ensure delivery of targets/objectives within budget.</li> <li>Contribute to resource and budget planning within own area.</li> </ul> <p>Work with others</p> <ul style="list-style-type: none"> <li>Liaise internally and externally at senior levels to establish service requirements and priorities and ensure the department/service issues are appropriately represented and acted upon.</li> <li>Work with managers, service representatives and partners to identify and apply cost effective means of delivering improvements to business processes and strategies.</li> </ul> <p>People Management</p> <ul style="list-style-type: none"> <li>Manage a group of staff across a function/service, or as a significant part of a wide function to ensure all relevant annual targets and goals are delivered within budgetary/resource constraints.</li> <li>Lead, motivate and develop individuals using a coaching approach, to better meet current and future requirements.</li> </ul> <p>Duties for all</p> <p>Values: To uphold the values and behaviours of the organisation.          Equality &amp; Diversity: To work inclusively, with a diverse range of stakeholders and promote equality of opportunity.          Health, Safety &amp; Welfare: To maintain high standards of Health, Safety and Welfare at work and take reasonable care for the health and safety of themselves and others.</p>
<b>Education, Knowledge, Skills &amp; Abilities, Experience and Personal Characteristics</b>	<ul style="list-style-type: none"> <li>Degree or equivalent professional qualification plus substantial experience at a senior management level in a specialist area.</li> <li>Knowledge of the principles of change management, project management and continuous improvement, and their practical application.</li> <li>Authoritative knowledge of the work practices, process and procedures relevant to the role including broader sector/commercial awareness.</li> <li>Ability to manage budgets and resources to deliver effective support to their area of responsibility.</li> <li>Strong written and oral communication and interpersonal skills with high level negotiation and influencing skills and the ability to work collaboratively with internal and external partners/professionals.</li> <li>Comprehensive knowledge of computerised business systems.</li> <li>Understands how to inspire and motivate others.</li> <li>Advanced problem solving and analytical skills with the capacity to devise and implement innovative solutions for strategic change.</li> <li>Wide experience in successful leading, coaching, mentoring and developing of staff.</li> </ul>
<b>Details of the specific qualifications and/or experience if required for the role in line with the above description</b>	<p>Role holder must have the ability and willingness to travel extensively to meet regularly with customers across the Counties within Orbis and Partner London Boroughs.</p> <p>Evidence of continuing professional development to foster ambitious commercial expertise.</p> <p>An in-depth knowledge and understanding of the technical processes of a number of services is required in order to respond comprehensively and appropriately to all customer enquiries.</p>
<b>Role Summary</b>	<p>Roles at this level are substantial management roles, they are either managing a multi functional support service within one of the Council's service areas, or coordinating a specific business development or advisory area. This may involve significant coordination of complex or diverse services, e.g. leading business support services to professional teams, or coordinating teams carrying out specialist advisory or administrative services. More specialised roles will require a full understanding of a professional or specialised field and will work with those both inside and outside the organisation, to influence the development of services or delivery of specific projects or council objectives. They will provide overall guidance to more junior managers in terms of planning, service standards and resources which underpin service level agreements. Planning takes place over a one year horizon. They work closely with customers, staff, agencies and/or contractors to ensure that the services meet and exceed expectations. Roles at this level require extensive management experience and high level expertise. They exercise a significant degree of flexibility and independence for decision making within their particular functional area, working to broad parameters and policy guidance. Roles at this level are accountable for the professionalism of service delivery under their remit.</p>

## To be completed by JE Coordinator

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