

JOB DESCRIPTION

SECTION 1

BASIC DATA

| | | | |
|--------------------|---|----------------------|---------------------------------|
| Name: | | Job Title: | Financial Education Coordinator |
| Reports to: | Financial Education Relationship Support Manager | Job Location: | London |
| Department: | Financial Education | Job Family: | Support |

SECTION 2

DEPARTMENT STRUCTURE

Please see Appendix A attached.

SECTION 3

OVERALL JOB PURPOSE

A key focus is development of meaningful relationships with delivering/potential schools and colleges (Centres) and the desire to retain and expand the business levels across the UK and devolved nations.

To support the Financial Education Relationship Managers with all Centre specific contact and administrative activities enabling the team to operate most effectively and provide first class customer experiences.

To be proactive in the development of new enquiries from all marketing and communications related activities.

SIZE/DIMENSIONS

(In what context does this role operate in terms of area of impact, financial budgets and supervision and or management of staff.)

No budget or spending authority

SECTION 4

PRINCIPAL ACTIVITIES/OUTPUT OF JOB

(This area outlines in more detail the duties of the post holder).

- Welcome calls and letters at time of registration, updating records accordingly
- Act as liaison between RM's & relevant team(s) regarding any issues identified on the learning platform & website
- Co-ordinate marketing initiatives and keep recording of results to help identify which activities are most productive, proactively chasing marketing activity for maximum business opportunities
- Adding Prospect centres details and notes to OASIS

- Booking and co-ordinating appointments for RM's post strategy meetings
- Updating and maintaining records on OASIS (contact details, emails, meeting notes etc.)
- Preparing information for RM's for meetings including ACR (Annual Centre Reviews)
- Co-ordinating, assisting and presenting (when applicable) with conferences and events i.e. CPD
- Providing preview access to learning platform for prospect centres
- Pro-active centre support as requested by RM's
- Dealing with requests for materials and resources for centres
- Contacting Centres when requested by RM's or as part of a contact strategy
- Liaising with the FE Operations team to ensure the best possible support for centres Liaising with other departments to support RM initiatives
- Represent the FE Team in internal efficiency projects such as Lean

CONTACTS AND INFLUENCE EXERCISED

(Type, number and seniority of contacts, impact of influence)

- External contact with Centres including Exams Officers and Teachers (through FC events, online communication, school visits and ACR activity.
- To work with the Support and Operations team to ensure a high level of customer care is achieved.
- To support the FE Faculty in working in partnership with other agents of The London Institute of Banking & Finance to promote our range of academic solutions;
- To apply the values of The London Institute of Banking & Finance.

DECISIONS

(How much freedom is there to provide solutions, and make decisions regarding the resolution of problems within the constraints of established guidelines or procedures, and supervision?)

- To operate within determined parameters from time availability;
- To freely make day-to-day decisions within own authority and understanding of The London Institute of Banking & Finance qualifications and solutions

Indicate the level which best describes the job holder's involvement in the decision-making process:

| | |
|--|---|
| Follows written and verbal instructions and established guidelines | x |
| Interprets policies & procedures | |
| Participates in the establishment of guidelines & procedures | |
| Acts as final authority to implement policy, guidelines and procedures that affect strategic goals | |

Indicate the statement which best describes the impact of the job holder's decisions:

| | |
|--|---|
| Restricted to employee's own work | x |
| Has impact on department/directorate* objectives | x |
| Has impact on The London Institute of Banking & Finance objectives | |

Examples of the decisions that are generally made by the job holder

(To be added by line manager/employee)

- Prioritise workload to ensure that RM's can operate most effectively
- Prioritise workload to ensure good customer service.
- The booking of appointments for RM's for existing, new and prospect centres.
- Updating and amending information on OASIS

DEFINITION /CLARITY

(The extent to which to job is defined; the clarity of the job's boundaries, levels of uncertainty)

The role is clearly defined but does involve working collaboratively with RM's, Marketing, Operations and other departments that are involved with FE.

ANY ADDITIONAL FEATURES OF NOTE

None.

PERSON SPECIFICATION

Job Title: Financial Education Coordinator
Reports to: Financial Education Relationship Support Manager
Department: Financial Education and Community Outreach

| Qualifications, knowledge and professional memberships | Essential / desirable? | |
|--|-------------------------------|-------------------------------|
| Knowledge of the Education system | D | |
| Proven track record in sales | D | |
| Knowledge of the Financial Services Sector | D | |
| Technical competencies (skills and experience) | Essential / desirable? | |
| Time Management | E | |
| Presentation creation and delivery skills | D | |
| Core Competencies (this section should contain the level of competency required to carry out this role. Please refer to the competency framework for clarification where needed. Placing a N/A where the competency is not required as part of the job) | Essential / desirable? | Core for all employees |
| Values | | |
| Collaboration | E | C |
| Adaptability | E | C |
| Innovation | E | C |
| Integrity | E | C |
| Support | E | C |
| Skills and Experience | Essential / desirable? | Core or Enhanced |
| Communicating effectively | E | C |
| Business thinking | D | C |
| Developing Yourself | E | C |
| Getting things done to achieve results | D | En |
| Digital Capability | D | C |
| The Customer Experience | E | C |
| Managing quality and standards | E | C |
| Applying judgement and taking decisions | E | C |

Signed
 JOB HOLDER

Date

Signed
 LINE MANAGER

Date

Appendix A

