



Client Service Manager

Reporting to: Head of Operations

Salary: £30,000 - £34,000 depending on experience

Hours of work: 35 hours per week

Company Benefits:

- 30 days holiday per annum pro rata, plus bank holidays
- Company Pension
- Annual Bonus scheme
- Group Income Protection and Private Medical Insurance where available on completion of Probation period

Why Lucent: Lucent Financial Planning are an innovative, caring and dynamic company. Our vision is to help people get the most out of their lives by getting the most out of their money.

We pride ourselves in providing amazing client experience and service. We regularly host client social and education events, along with walks and workshops. We have a strong team ethos full of Lucent love!

Position Overview: You've got one life and you spend a LOT of it at work, so we make sure the work we do has a real and significant impact for you, and the people we work for!

We want agile, forward thinking and client centric individuals who are passionate about delivering the highest standards of work to benefit our clients and colleagues. We want people who are curious and want to continuously learn and develop themselves, no matter what they want to achieve in their career.

The Client Service & Business Analysis team is the heart of our business, providing first class service directly to our clients and supporting our Financial Advisors to give the best possible advice, allowing our clients to meet their personal goals. We want our clients to be part of the Lucent Family and this team has a critical role in developing that culture.

The role is busy, and every day is different so we want people who can manage variety but still deliver excellent attention to detail with that personal touch.

In this role you will need diverse skills, and we do encourage you to develop. If you want to be a Financial Advisor this is the best place to start, we will support the cost of your diploma, and you will learn the fundamentals of advice. However, if your skills are elsewhere and you want to specialise in other things like Client Experience, Project Management or Data & Analytical skills this can still be the role for you.

Key responsibilities:

- Own our client communications, no matter the channel. Face to face, over the phone, email, post and portal you are the first point of contact for our clients and you need to look after them, solve their problems and make sure they feel part of our community.
- Manage our Letters of Authority requests, making sure we receive them in a timely manner.
- Use of AI to create policy information tables with key critical policy details, supporting advisors to understand the best client outcomes.
- Use of industry systems such as Voyant, Timeline, Intelliflo & FE analytics, Money Info keeping our data up to date and accurate.
- Manage tasks on behalf of advisors & all client queries to deliver outcomes efficiently and accurately.
- Support the creation and delivery of Lucent Client Events. Actively hosting and entertaining our clients through engaging events to create memorable experiences. Gathering feedback to ensure we continually develop and grow our proposition.
- Manage & contribute to Lucent Social Media activities with the aim to drive client engagement and new business opportunities.
- Ensure a seamless and client-centric journey across all touchpoints:
 - o Welcome experience (e.g. car parking, personal greetings)
 - o Client Onboarding
 - o Call handling and responsiveness
 - o Annual review coordination
 - o Timely preparation of client welcome packs
 - o Optimisation of referral tools (LinkedIn, Vouched)
 - o Support community presence and annual initiatives

- o Coordinate award submissions for Lucent
- o Maintain the client expenditure spreadsheet
- o Oversee Financial Promotions compliance and approvals
- o Conduct client surveys and manage festive communications

Essentials:

- Able to work as a team supporting others and use own initiative with a 'can do' 'positive' attitude
- Efficient and diligent in getting things done
- Highly effective organisational and planning skills
- Excellent Telephone skills
- Good knowledge and competence of Microsoft Word and Excel
- Delivery focused, with a drive for quality throughout
- Excellent interpersonal and communication skills
- Must have a keen eye for detail
- Strong IT skills and general administration

Desired:

- System competence: Intelligent office, Voyant, Timeline, Money Info
- Social media and Website management
- High levels of literacy and numeracy skills

Lucent Values: CHANGE

- **Curious** - we are eager to learn to better ourselves and our clients
- **Honest** - we do the right thing by ourselves and our clients
- **Alternative** - we embrace and celebrate our uniqueness
- **Nurturing** - we help those around us grow to be their best
- **Generous** - our time and support is open to all
- **Entrepreneurial** - we don't stand still – ideas are there to pursue

[Click here to apply for this role](#)