

Customer Support Consultant

Reports to: Customer Support Team Leader

Direct Reports: N/A

Department/Team: Customer Success

Job Purpose

Deliver excellent customer support across the full range of Defaqto's software solutions to all internal and external customers, ensuring all software and data issues are recorded, investigated, resolved and communicated in a professional manner within agreed timelines.

Key Responsibilities

- Develop and maintain in-depth knowledge of all Defaqto's products/services and how clients use them – in particular, the Defaqto Engage software for financial advisers.
- Answer telephone calls from customers and respond to incoming customer emails in a timely manner.
- Take appropriate steps to obtain and evaluate all relevant information from the customer in order to fully understand each customer's problems and concerns. Provide relevant and accurate support, information and services in response to customer needs.
- Prioritise and manage issues effectively, adhering to Best Practice Guidelines. Investigate issues in liaison with relevant internal teams, including Application Support, IT Development, Research and Insight.
- View XML or CSV files to identify missing data or data errors to help resolve customer queries.
- Assist customers to understand how to use our software and how to interpret our data. Recommend training where appropriate.
- Meet defined timescales for initial response, issue replication, identification of severity level, next course of action and issue resolution.
- Record all reported issues in CRM system and ensure progress is logged appropriately in internal support ticketing system.
- Collaborate effectively as a team to ensure effective handover of issues between team members and to enable any team member to progress any issue efficiently and effectively.
- Advise internal and external customers of relevant software updates, outages and changes; and relevant data developments.
- Work with relevant departments to identify process changes to prevent reoccurrence of issues. Coordinate action to ensure implementation and to ensure documentation is updated accordingly.
- Proactively monitor all applications to ensure advance warning of issues that will impact the customer.
- Configure Defaqto Compare software in line with Client requirements within agreed SLAs
- Set up and configure data extracts for customers.
- Participate in the testing of new software releases and patch fixes.
- Maintain and update process documents.
- Provide assistance to the Contracts & Licensing team when required.

Defaqto is a flexible, fast paced and entrepreneurial organisation and our employees have a collaborative, can-do approach to work. As such, this document is intended only as an outline of the main elements of the job and employees are likely to be involved in other activities to contribute to the success of the company. This document will also be amended from time to time in the light of changing business needs.

Job Requirements

	Essential at Recruitment	Desirable (could be developed in role)
Qualifications & Training	<ul style="list-style-type: none"> At least five A to C grade GCSEs or equivalent, including Maths and English 	<ul style="list-style-type: none"> Degree educated, or able to demonstrate equivalent intellectual ability Relevant financial services qualifications (e.g. Certificate in Financial Services)
Knowledge	<ul style="list-style-type: none"> High level of general IT literacy, including good working knowledge of MS Office applications Working knowledge of operating systems such as Windows and/or OSX, web browsers such as IE, Edge, Chrome, Safari, etc. and basic website functionality An interest in, and willingness to learn about, the financial services industry and financial products 	<ul style="list-style-type: none"> Good understanding of the UK financial services industry Good working knowledge of financial products (particularly pension, investment and protection products) and how these are distributed to consumers Awareness of Defaqto and its products and services – and other software used by financial advisers
Skills	<ul style="list-style-type: none"> Excellent customer support skills, combining customer service with technical support Good written and verbal communication skills, including an excellent telephone manner and confident outbound calling skills Good interpersonal skills, including strong team working skills Ability to perform tasks in a structured well thought-out manner (such as triaging and testing), plus good problem solving skills Capable of quickly learning new software and explaining it to others Strong administration and organisational skills, with the ability to plan and prioritise work to meet deadlines Capable of developing in-depth understanding of an industry or sector (demonstrated through previous experience) 	<ul style="list-style-type: none"> Good level of numeracy, with the ability to analyse and interpret data in MS Excel Good relationship building skills Good project planning and co-ordination skills
Experience	<ul style="list-style-type: none"> Providing telephone based customer support, where individual cases are owned and managed from initial call to issue resolution Collaborative problem solving, involving liaison with other internal departments Using a ticketing system to log, document and manage cases – where clear and accurate entry of information is important 	<ul style="list-style-type: none"> Providing customer support for software applications Providing support to business customers Working within the financial services industry, particularly with financial advisers Using remote access software
Approach to Work	<ul style="list-style-type: none"> Passionate about providing excellent customer support – both externally and internally Resilient customer support approach, remaining calm and patient at all times Positive and proactive, uses initiative and takes responsibility – prepared to go the extra mile to deliver optimal results Collaborative and supportive team player – thinks and works cross-functionally – influences others, but also compromises to find the right solution for the business Inquisitive and innovative – thinks creatively to find solutions Flexible, ‘can do’ approach with a positive response to change Committed to working within established processes and guidelines Methodical and diligent, with strong attention to detail and high quality standards Target oriented, self-motivated and aspirational with a strong drive for results 	
Special Conditions	<ul style="list-style-type: none"> Work on a rota covering shifts of 08:30-17:00 and 09:00-17:30, and willing to work outside of normal office hours when necessary to respond to business needs Willing to provide cover over the Christmas holiday period 	