

## ROLE PROFILE AND PERSON SPECIFICATION

### ROLE PROFILE

**Job Title: Helpdesk Consultant Apprenticeship**

**Hours of Work:** 40 hours a week (in 8 hour shifts between 8am and 8pm Monday to Friday, and 9:30am to 12:30pm Saturday mornings when required)

**Reporting to:** Helpdesk Team Leader

#### SUMMARY:

An apprenticeship with us offers an outstanding opportunity to become a key member of our team working in a real job. You will earn a salary and get valuable experience from day one.

Our structured learning programme provides apprentices with nationally recognised qualifications and workplace training that provides you with the skills needed for a successful career. You will receive continuous support throughout from your line manager, education provider and mentor for the duration of the apprenticeship.

Hargreaves Lansdown have been helping our customers make more of their pensions and investments for over 30 years and is one of the most innovative, respected and fastest growing companies in the UK. Our success is based on a deep understanding of our customers' needs and a fierce determination to be the best in our market.

The Helpdesks provide our 783,000+ customers with a 'knock your socks off service'. The Helpdesks are key to ensuring customers receive the service we pride ourselves on. Every year we are recognised by our customers for our exceptional service levels. You will be an important member of the team and over your time with us you will gain experience with a variety of Helpdesk teams.

#### KEY DUTIES AND RESPONSIBILITIES:

- Speaking to and helping customers with enquiries. Being a key point of contact for customers and dealing with a variety of queries from a basic request to complex, in-depth calls.
- You will learn about our products and industry regulations.
- To provide customers with relevant and accurate information needed to help them with their enquiry. This information must be given in a clear, balanced and fair manner, in a way that the customer understands to help them to make their own investment decisions. All action taken to deal with an enquiry should be documented on the client database.
- Communicate with other people in and out of the company to successfully resolve a customer's enquiry.
- Maintain a high level of customer service, remaining polite, courteous and diligent at all times. Helping us to maintain our reputation for excellence.
- Respect customer confidentiality and follow rules in place to protect this.
- Pass on feedback from customers to help the company improve its services and exceed client satisfaction.
- Ensure customers are treated fairly, in line with regulatory guidelines.
- Reply to client letters and emails.
- Meet clients face-to-face from time to time.
- Report any customer dissatisfaction or suspicion of money-laundering appropriately.

### PERSON SPECIFICATION

|                | ESSENTIAL   | DESIRABLE  |
|----------------|---|--|
| QUALIFICATIONS | <ul style="list-style-type: none"> <li>• 5 GCSE's grades A-C including Maths &amp; English</li> </ul> | <ul style="list-style-type: none"> <li>• A Levels or equivalent</li> </ul>   |
| KNOWLEDGE      | <ul style="list-style-type: none"> <li>• Basic computer literacy</li> </ul>                           | <ul style="list-style-type: none"> <li>• Basic knowledge of financial services</li> <li>• Computer literate; proficient with Microsoft Office and using in-house systems</li> <li>• Knowledge of products and services offered by Hargreaves Lansdown</li> </ul> |

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|-------------------|--|---|
| <b>EXPERIENCE</b> | <ul style="list-style-type: none"><li>• None required</li></ul>  | <ul style="list-style-type: none"><li>• Any relevant experience (e.g. working in an office, customer service role, etc.)</li><li>• Experience working on the telephone</li></ul>  |
| <b>SKILLS</b>     | <ul style="list-style-type: none"><li>• Good communication skills</li><li>• Good written and numeracy skills</li><li>• Excellent attention to detail</li><li>• Ability to perform under pressure</li></ul>   | <ul style="list-style-type: none"><li>• Good telephone manner</li><li>• Good organisational skills</li><li>• Ability to multi-task</li></ul>                                      |
| <b>ATTRIBUTES</b> | <ul style="list-style-type: none"><li>• Drive to achieve client satisfaction</li><li>• Patient, reliable and trustworthy</li><li>• Professional, presentable appearance</li><li>• Pro-active and positive</li><li>• Team player</li><li>• Sense of pride from doing a good job</li></ul> | <ul style="list-style-type: none"><li>• Willingness to learn and desire to develop professionally</li><li>• Proven desire to succeed</li><li>• Excellent problem solver</li></ul> |