

## Hargreaves Lansdown, Role Profile and Person Specification

### Role Profile

<b>Job Title: Head of Advisory Services Operations</b>	<b>Hours of Work: Mon – Fri, 9am – 5pm. 35 per week.</b>
<b>Department: Financial Practitioners / Corporate Solutions</b>	<b>Reporting To: Head of Advisory Services / Head of Corporate Advice</b>

### Summary:

There is a requirement for a Head of Operational Management to jointly report into the Financial Practitioner and Corporate Solutions areas of the business.

The individual will be required to review the systems and processes of both areas of the HL business with a remit to bring about relevant improvement to efficiency with changes that they implement. The review process will be constant and re-review of processes and systems will be required on a periodic basis to ensure they are still in line with ever changing regulation, but also ever changing system functionality.

The right individual will be a “thinker” as well as a “doer” and the role will require constant understanding and analysis of both sides of the business. If improvements can be made to help with efficiency it will be your task to scope out and implement these changes, with assistance from the Heads of both of the areas. You must believe in your ability to scope out and make improvements.

You will be required to work confidently with all areas and at all levels of the company with strong project management and change management skills.

You will be a graduate with experience of managing and delivering organisational change, preferably in Financial Services. You will be managing multiple tasks at the same time, so an ability to prioritise your workload and meet deadlines is essential.

### Key Duties & Responsibilities

- Take up an operational overview of Financial Practitioners and Corporate Solutions to continually assess where system and process changes could be required and appropriate to help maintain the growth of the business areas and improve overall efficiency
- Understand Corporate Solutions and Financial Practitioners departments to be able to appreciate where changes can add value
- Work with all areas of the business to scope out and implement changes
- Scope out all avenues before coming to a decision on any changes to systems or processes – quantify the value add your decisions will have
- Regularly update the heads of departments as to the timelines of the active projects. Good quality and relevant Management Information and reporting will be required on a regular basis.
- Keep a keen track of your projects and manage them through the process
- Maintain up to date knowledge of developments within HLFP and HLCS , as well as in the wider industry, to help with the role as well as on-going professional development

### Person Specification:

	<b>Essential</b>	<b>Desirable</b>
<b>Qualifications</b>	<ul style="list-style-type: none"><li>• Good A Levels</li><li>• A degree of any discipline</li></ul>	<ul style="list-style-type: none"><li>• Diploma in Financial Planning (or equivalent)</li><li>• A business or systems related degree</li></ul>
<b>Knowledge</b>	<ul style="list-style-type: none"><li>• Good knowledge of the Financial advice process (both Corporate and Individual)</li><li>• Competent computer user; proficient with Microsoft office</li></ul>	<ul style="list-style-type: none"><li>• Working knowledge of the Financial advice process (both Corporate and Individual)</li></ul>

<b>Experience</b>	<ul style="list-style-type: none"> <li>• At least 3 years' experience in delivering organisational models</li> <li>• Experience of Change Management &amp; Project Management</li> </ul>	<ul style="list-style-type: none"> <li>• At least 3 years' experience of working within Financial Services</li> </ul>
<b>Competencies</b>	<ul style="list-style-type: none"> <li>• Excellent written and numeracy skills</li> <li>• Ability to prioritise workload and meet deadlines</li> <li>• Ability to use initiative</li> <li>• Excellent operational management skills</li> <li>• Ability to work with all levels of an organisation</li> </ul>	
<b>Attributes</b>	<ul style="list-style-type: none"> <li>• Commercial awareness</li> <li>• Capable of working with different groups that have differing objectives and priorities</li> <li>• Task orientated</li> <li>• Resourceful and positive attitude</li> <li>• Willing to take responsibility for the quality of your own work</li> <li>• Ability to work under pressure</li> </ul>	

Written by: Head of Corporate Advice  
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