

CAREER PATHWAYS



CONTENTS



Introduction.....	3
CAREER PATH OVERVIEW: CENTRAL SERVICES	4
Entry Level or Probation.....	5
Aspiring or Intermediate Level	6
Expert Level.....	7
CAREER PATH OVERVIEW: TECHNICAL.....	8
Preparer.....	9
Reviewer	10
Expert/specialist.....	11
PATHWAYS	
Pathway 1.....	13
Pathway 2.....	14
Pathway 3.....	15
Pathway 4.....	16
Pathway 5.....	17
Pathway 6.....	18
Pathway 7.....	19
Pathway 8.....	20
Pathway 9.....	21
Pathway 10	22
TRAINING SUITE	
Central Services.....	24
Technical	25
Client Facing	26
People Management.....	27

FINDING YOUR CAREER PATHWAYS

Used in conjunction with the quarterly appraisals, the aim of the career development pathway is to enable staff to outline their current skills and knowledge, think about goals and aspirations, and provide them with bespoke training and support to achieve those goals and aspirations.

CAREER PATH OVERVIEW: CENTRAL SERVICES



TECHNICAL

SERVICE DELIVERY

CLIENT FACING

PEOPLE MANAGEMENT

EXPERT LEVEL

TECHNICAL AUTHORITY

Has a unique specialism, anticipates impact of technical changes to manage commercial risk.

SHAPING BUSINESS QUALITY STRATEGY

Determines and delivers change to processes aiming for optimum service levels

WORKFLOW

Oversees production of work through their area of service ensuring timely delivery of work

RESOURCE

Advises on resource needs and acts on needs, recruiting and outsourcing as required

CLIENT FOCUS

Sets exceptional client service standards, highlights and implements change

LEADING PEOPLE

Contributes to key people development strategies

Evaluates and continually evolves learning opportunities across the business.

ASPIRING OR INTERMEDIATE LEVEL

TECHNICAL SPECIALIST

Deals with complex technical areas within their field of specialism, minimising risk and meeting legislative and client needs

MANAGING EXCELLENT SERVICE

Seeks out and implements improvement opportunities, resolves issues, provides alternatives for excellent service delivery

CLIENT FOCUS

Manage own workload and the requirements of colleagues and client

MANAGING PEOPLE

completes regular 1:1s and performance reviews

Encourages and gives opportunities to individuals to develop their skills

ENTRY LEVEL OR PROBATION

TECHNICAL GENERALIST

Up-to-date on technical knowledge & developments and applies it effectively

EXCELLENT SERVICE

Identifies opportunities to improve operational processes and highlight/reduce business risk

WORK EFFICIENCY

Completion of jobs to agreed timescales or highlights any issues promptly

CLIENT FOCUS

Quality excellence, day to day timely delegated jobs

SUPPORTING OTHERS

Supports others to get the job done

Shares knowledge and provides guidance as appropriate

ENTRY LEVEL OR PROBATION

Technical

- › Knowledge of phone systems and how we talk to clients
- › Knowledge of who's who and various departments of the business.
- › Health and safety policies and procedures
- › IT, IRIS and backup processes (specific to RS)
- › Data protection/legal awareness/GDPR/money laundering/breach processes
- › Understanding company terminology

Client Portfolio Business Growth

- › To be aware of the customer service expectation we look to deliver internally at RS
- › To be courteous and accommodating to internal requests that come in from our colleagues
- › To learn and maintain a high standard of internal written communication, using email or any other technology system such as Teams.

Service Delivery/Workflows

- › High level of courtesy and knowledge of who's who in the business, when internal or external enquiries come into your department
- › Understanding who RS key clients are
- › Knowledge of who to turn to when problems arise
- › To be an effective and approachable team member to all members of staff

People Management

- › Supports others to get the job done
- › Shares knowledge and provides guidance as appropriate

ASPIRING OR INTERMEDIATE LEVEL

Technical

- Proficient at job specific areas e.g. marketing/HR/finance/administration
- Owning own development, attending training courses, expanding your knowledge through reading, panels discussions, podcasts etc
- Fluency in company and sector specific terminology
- Data protection/legal awareness/GDPR/money laundering/breach processes
- Awareness of other core roles within the business
- Advancing IT skills in your role

Client Portfolio Business Growth

- To continually set high standards and benchmarks throughout the RS business
- To offer high levels of service and courtesy to external clients, suppliers, guests, visitors of RS
- Work efficiency, resource allocation on jobs to ensure delivery of tasks as agreed with your manager
- Managing excellent service, seeks out and implements improvement opportunities, resolves issues for excellent service delivery
- To demonstrate effective time management and personal effective techniques to improve overall efficiency

Service Delivery/Workflows

- To offer support, guidance and help to internal and external colleagues and clients
- The ability to solve internal and external problems that may arise from colleagues and guests
- To demonstrate confident decision making skills when faced with challenges or problems
- To prioritise external client activity over internal

People Management

- Managing people - completes regular 1:1s and performance reviews
- Encourages and gives opportunities to individuals to develop their skills

EXPERT LEVEL

Technical

- Strategic planning and delivery of job specific areas e.g. marketing/HR/finance/administration
- Mentoring other people e.g. new starters
- Creation and updating current technical processes
- Data protection/legal awareness/GDPR/money laundering/breach processes

Client Portfolio Business Growth

- Offering a full internal customer service experience to all colleagues within the business
- To offer and mentor others exceptional service standards when speaking to clients, suppliers, visitors, and guests of RS
- To be the public face of RS
- To have a full understanding of billing and statements for clients of RS
- To advocate the RS business when opportunities arise
- To support processes such as outsourcing and recruiting

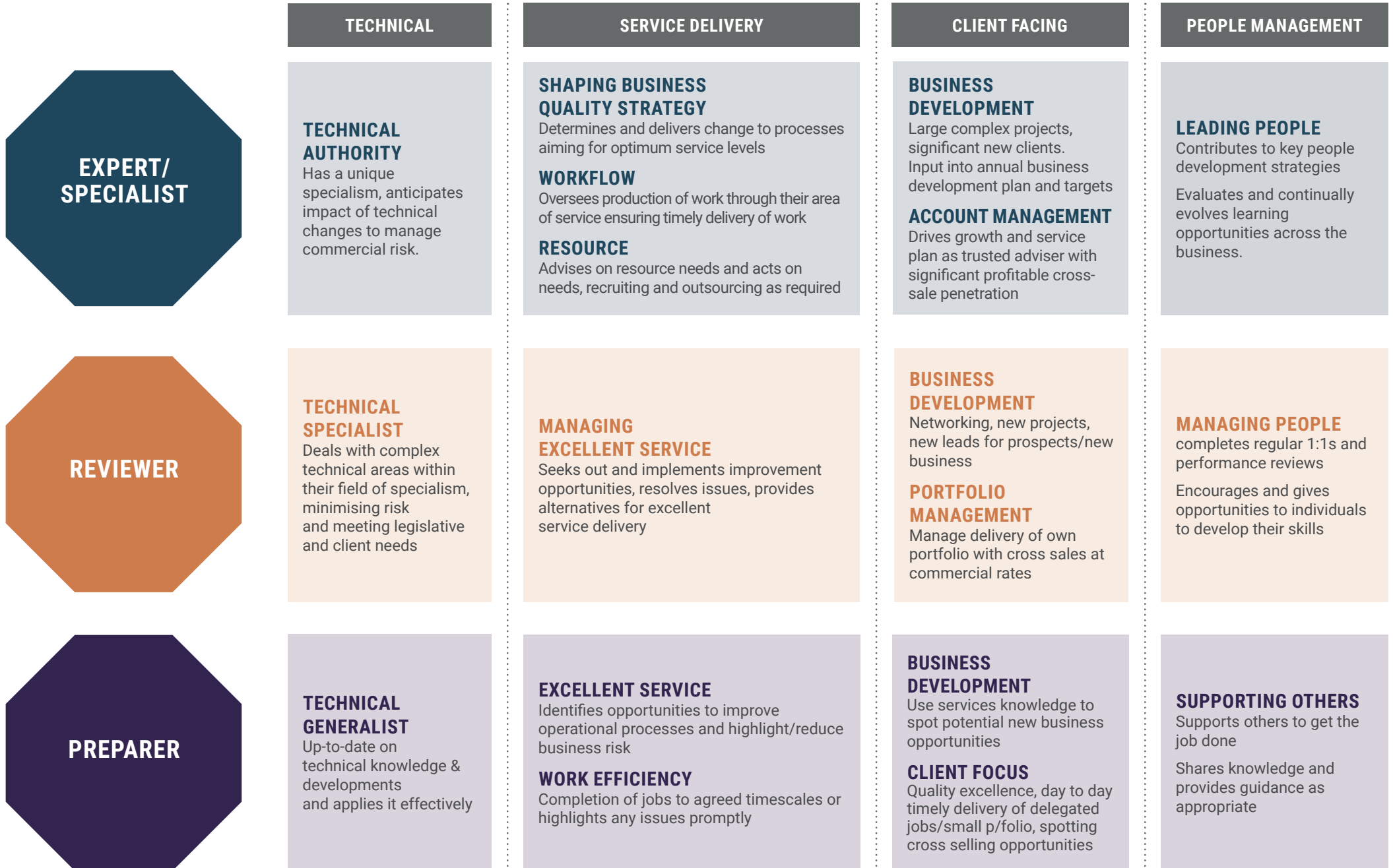
Service Delivery/Workflows

- Exceptional client service standards
- Gathering of testimonials from clients
- Mentoring and training others in client facing excellence
- A high knowledge of our clients
- Identifying commercial opportunities to refer our client advisors into
- Setting standards of client excellence, internally and externally with suppliers, guests, visitors.

People Management

- Leading people - contributes to key people development strategies
- Evaluates and continually evolves learning opportunities across the business.

CAREER PATH OVERVIEW: TECHNICAL



PREPARER

Technical

- › Assist with the preparation of work for a variety of clients.
- › Use a variety of software and ensure competency on such software.
- › Applies technical knowledge client issues.
- › Keeps up to date on relevant technical changes and consistently adheres to the Firm's standards of compliance.

Client Portfolio Business Growth

- › Identify additional business opportunities from existing clients.
- › Raise profile of the firm by ensuring clients are satisfied with the service and support they receive.
- › Liaise with clients where required – telephone calls, emails and client visits as necessary

Service Delivery/Workflows

- › Be aware of time allocated for each piece of work and flag overruns.
- › Achieve quality and efficiency in service delivery.
- › Put forward ideas to improve ways of working and service.

People Management

- › Supports others on day to day activities to get job done well.
- › Acts as first point of reference to others for guidance as appropriate.
- › Actively sets an example to others for continual personal and professional development.

REVIEWER

Technical

- › Provide technical coaching to preparers in the team
- › Review assignments and ensure client manager has information required to hold client meetings as appropriate
- › Uses technical knowledge to anticipate and resolve client technical issues including potential conflicts of interest
- › Anticipates the impact of technical changes to manage job risks
- › Discusses technical issues with other reviewers in the business, e.g. a tax reviewer communicates a tax point with an accounts reviewer.

Client Portfolio Business Growth

- › Undertake networking activity to raise the profile of the business and opportunities within the local business and professional community.
- › Meet with potential new clients as required and prepare fee proposals for the work/services discussed. Liaise with directors when preparing the proposal.
- › Act as lead co-ordinator for a portfolio of clients coordinating all relevant input to ensure client needs are identified and met. Meet and talk with clients regularly to develop relationship
- › Build and maintain client relationships and practise principles of excellent client service at all times

Service Delivery/Workflows

- › Regularly review IRIS Practice Management to ensure compliance work and projects are scheduled, monitored and completed on time
- › Work with client managers with regards deadlines and budgets on their clients
- › Meet regularly with the directors to update them individually on their current job position and ensure they are aware of forthcoming deadlines
- › Monitor job costs and work closely with Client Advisors to optimise recoveries
- › Undertake projects to improve systems, processes and ways of working, explaining the benefits and 'how to implement'
- › Demonstrate commercial understanding of the goals and challenges of client manager and the business and take a collaborative approach to service issues and efficiencies

People Management

- › Manages employee relations & supports recruitment process
- › Undertakes 1:1s and reviews to support performance and development.
- › Actively coaches and mentors individuals to help improve their performance.
- › Supports individuals' development by regularly creating development opportunities.

EXPERT/ SPECIALIST

Technical

- › Set and continually review high technical standards for their area of expertise within the firm
- › Anticipates the impact of technical changes in their field to ensure the business is well positioned to deal with them effectively
- › Established expert in a specific technical field, delivering powerful solutions.
- › Communicates internally and externally their area of specialism and the impact of changes.

Client Portfolio Business Growth

- › Proactive participation in the winning of large and complex project client wins.
- › Formulates defined plans to deliver agreed levels of business growth
- › Is recognised as a trusted adviser, creating client confidence and satisfaction as a priority
- › Introduces significant projects that require proactive positioning with clients for a range of services
- › Maintains a rich and growing pipeline of opportunities for various services with strong conversion levels.

Service Delivery/Workflows

- › Leads by example to create a climate of continual improvement in business operations.
- › Creates an annual service delivery plan for continual improvement and efficiency that inspires confidence across the teams.
- › Be involved with the service area budget preparation. Share targets with the team and motivate to achieve
- › Liaise with other service areas to ensure workflows between teams work well and are enhanced where necessary
- › Continually works on improving systems and processes for efficiency and customer service

People Management


- › Undertakes longer term succession & career planning.
- › Creates a positive environment in which people want to and can improve performance through feedback & coaching.
- › Provides framework for people to take on additional responsibilities for their own development.
- › Regularly evaluates learning and opportunities in terms of business benefits.

PATHWAYS





TECHNICAL

TECHNICAL AUTHORITY 
has a unique specialism, anticipates impact of technical changes to manage commercial risk.

SERVICE DELIVERY

SHAPING BUSINESS QUALITY STRATEGY
Determines and delivers change to processes aiming for optimum service levels

WORKFLOW
Oversees production of work through their area of service ensuring timely delivery of work

RESOURCE
Advises on resource needs and acts on needs, recruiting and outsourcing as required

CLIENT FACING

BUSINESS DEVELOPMENT
Large complex projects, significant new clients. Input into annual business development plan and targets

ACCOUNT MANAGEMENT
Drives growth and service plan as trusted adviser with significant profitable cross-sale penetration

PEOPLE MANAGEMENT

LEADING PEOPLE
Contributes to key people development strategies
Evaluates and continually evolves learning opportunities across the business.



TECHNICAL SPECIALIST 
Deals with complex technical areas within their field of specialism, minimising risk and meeting legislative and client needs

MANAGING EXCELLENT SERVICE
Seeks out and implements improvement opportunities, resolves issues, provides alternatives for excellent service delivery

BUSINESS DEVELOPMENT
Networking, new projects, new leads for prospects/new business

PORTFOLIO MANAGEMENT
Manage delivery of own portfolio with cross sales at commercial rates

MANAGING PEOPLE
completes regular 1:1s and performance reviews
Encourages and gives opportunities to individuals to develop their skills



TECHNICAL GENERALIST 
Up-to-date on technical knowledge & developments and applies it effectively

EXCELLENT SERVICE
Identifies opportunities to improve operational processes and highlight/reduce business risk

WORK EFFICIENCY
Completion of jobs to agreed timescales or highlights any issues promptly

BUSINESS DEVELOPMENT
Use services knowledge to spot potential new business opportunities

CLIENT FOCUS
Quality excellence, day to day timely delivery of delegated jobs/small p/folio, spotting cross selling opportunities

SUPPORTING OTHERS
Supports others to get the job done
Shares knowledge and provides guidance as appropriate

PATHWAY 2



Click the cog symbol to take you to the relevant training courses page.



EXPERT/ SPECIALIST

TECHNICAL

TECHNICAL AUTHORITY

Has a unique specialism, anticipates impact of technical changes to manage commercial risk.

SERVICE DELIVERY

SHAPING BUSINESS QUALITY STRATEGY

Determines and delivers change to processes aiming for optimum service levels

WORKFLOW

Oversees production of work through their area of service ensuring timely delivery of work

RESOURCE

Advises on resource needs and acts on needs, recruiting and outsourcing as required

CLIENT FACING

BUSINESS DEVELOPMENT

Large complex projects, significant new clients. Input into annual business development plan and targets

ACCOUNT MANAGEMENT

Drives growth and service plan as trusted adviser with significant profitable cross-sale penetration

PEOPLE MANAGEMENT

LEADING PEOPLE

Contributes to key people development strategies

Evaluates and continually evolves learning opportunities across the business.

REVIEWER

TECHNICAL SPECIALIST

Deals with complex technical areas within their field of specialism, minimising risk and meeting legislative and client needs

MANAGING EXCELLENT SERVICE

Seeks out and implements improvement opportunities, resolves issues, provides alternatives for excellent service delivery

BUSINESS DEVELOPMENT

Networking, new projects, new leads for prospects/new business

PORTFOLIO MANAGEMENT

Manage delivery of own portfolio with cross sales at commercial rates

MANAGING PEOPLE

completes regular 1:1s and performance reviews

Encourages and gives opportunities to individuals to develop their skills

PREPARER

TECHNICAL GENERALIST

Up-to-date on technical knowledge & developments and applies it effectively



EXCELLENT SERVICE

Identifies opportunities to improve operational processes and highlight/reduce business risk

WORK EFFICIENCY

Completion of jobs to agreed timescales or highlights any issues promptly

BUSINESS DEVELOPMENT

Use services knowledge to spot potential new business opportunities

CLIENT FOCUS

Quality excellence, day to day timely delivery of delegated jobs/small p/folio, spotting cross selling opportunities

SUPPORTING OTHERS

Supports others to get the job done

Shares knowledge and provides guidance as appropriate

PATHWAY 3



Click the cog symbol to take you to the relevant training courses page.



EXPERT/ SPECIALIST

TECHNICAL

TECHNICAL AUTHORITY

Has a unique specialism, anticipates impact of technical changes to manage commercial risk.

SERVICE DELIVERY

SHAPING BUSINESS QUALITY STRATEGY

Determines and delivers change to processes aiming for optimum service levels

WORKFLOW

Oversees production of work through their area of service ensuring timely delivery of work

RESOURCE

Advises on resource needs and acts on needs, recruiting and outsourcing as required

CLIENT FACING

BUSINESS DEVELOPMENT

Large complex projects, significant new clients. Input into annual business development plan and targets

ACCOUNT MANAGEMENT

Drives growth and service plan as trusted adviser with significant profitable cross-sale penetration

PEOPLE MANAGEMENT

LEADING PEOPLE

Contributes to key people development strategies

Evaluates and continually evolves learning opportunities across the business.

REVIEWER

TECHNICAL SPECIALIST

Deals with complex technical areas within their field of specialism, minimising risk and meeting legislative and client needs

MANAGING EXCELLENT SERVICE

Seeks out and implements improvement opportunities, resolves issues, provides alternatives for excellent service delivery

BUSINESS DEVELOPMENT

Networking, new projects, new leads for prospects/new business

PORTFOLIO MANAGEMENT

Manage delivery of own portfolio with cross sales at commercial rates

MANAGING PEOPLE

completes regular 1:1s and performance reviews

Encourages and gives opportunities to individuals to develop their skills

PREPARER

TECHNICAL GENERALIST

Up-to-date on technical knowledge & developments and applies it effectively



EXCELLENT SERVICE

Identifies opportunities to improve operational processes and highlight/reduce business risk

WORK EFFICIENCY

Completion of jobs to agreed timescales or highlights any issues promptly

BUSINESS DEVELOPMENT

Use services knowledge to spot potential new business opportunities

CLIENT FOCUS

Quality excellence, day to day timely delivery of delegated jobs/small p/folio, spotting cross selling opportunities



SUPPORTING OTHERS

Supports others to get the job done

Shares knowledge and provides guidance as appropriate

PATHWAY 4



Click the cog symbol to take you to the relevant training courses page.



EXPERT/ SPECIALIST

TECHNICAL

TECHNICAL AUTHORITY

Has a unique specialism, anticipates impact of technical changes to manage commercial risk.

SERVICE DELIVERY

SHAPING BUSINESS QUALITY STRATEGY

Determines and delivers change to processes aiming for optimum service levels

WORKFLOW

Oversees production of work through their area of service ensuring timely delivery of work

RESOURCE

Advises on resource needs and acts on needs, recruiting and outsourcing as required

CLIENT FACING

BUSINESS DEVELOPMENT

Large complex projects, significant new clients. Input into annual business development plan and targets

ACCOUNT MANAGEMENT

Drives growth and service plan as trusted adviser with significant profitable cross-sale penetration

PEOPLE MANAGEMENT

LEADING PEOPLE

Contributes to key people development strategies

Evaluates and continually evolves learning opportunities across the business.

REVIEWER

TECHNICAL SPECIALIST

Deals with complex technical areas within their field of specialism, minimising risk and meeting legislative and client needs

MANAGING EXCELLENT SERVICE

Seeks out and implements improvement opportunities, resolves issues, provides alternatives for excellent service delivery

BUSINESS DEVELOPMENT

Networking, new projects, new leads for prospects/new business

PORTFOLIO MANAGEMENT

Manage delivery of own portfolio with cross sales at commercial rates

MANAGING PEOPLE

completes regular 1:1s and performance reviews

Encourages and gives opportunities to individuals to develop their skills

PREPARER

TECHNICAL GENERALIST

Up-to-date on technical knowledge & developments and applies it effectively

EXCELLENT SERVICE

Identifies opportunities to improve operational processes and highlight/reduce business risk

WORK EFFICIENCY

Completion of jobs to agreed timescales or highlights any issues promptly

BUSINESS DEVELOPMENT

Use services knowledge to spot potential new business opportunities

CLIENT FOCUS

Quality excellence, day to day timely delivery of delegated jobs/small p/folio, spotting cross selling opportunities

SUPPORTING OTHERS

Supports others to get the job done

Shares knowledge and provides guidance as appropriate

PATHWAY 5



Click the cog symbol to take you to the relevant training courses page.



EXPERT/ SPECIALIST

TECHNICAL

TECHNICAL AUTHORITY

Has a unique specialism, anticipates impact of technical changes to manage commercial risk.

TECHNICAL SPECIALIST

Deals with complex technical areas within their field of specialism, minimising risk and meeting legislative and client needs

TECHNICAL GENERALIST

Up-to-date on technical knowledge & developments and applies it effectively



SERVICE DELIVERY

SHAPING BUSINESS QUALITY STRATEGY

Determines and delivers change to processes aiming for optimum service levels

WORKFLOW

Oversees production of work through their area of service ensuring timely delivery of work

RESOURCE

Advises on resource needs and acts on needs, recruiting and outsourcing as required

MANAGING EXCELLENT SERVICE

Seeks out and implements improvement opportunities, resolves issues, provides alternatives for excellent service delivery

EXCELLENT SERVICE

Identifies opportunities to improve operational processes and highlight/reduce business risk

WORK EFFICIENCY

Completion of jobs to agreed timescales or highlights any issues promptly

CLIENT FACING

BUSINESS DEVELOPMENT

Large complex projects, significant new clients. Input into annual business development plan and targets

ACCOUNT MANAGEMENT

Drives growth and service plan as trusted adviser with significant profitable cross-sale penetration

BUSINESS DEVELOPMENT

Networking, new projects, new leads for prospects/new business

PORTFOLIO MANAGEMENT

Manage delivery of own portfolio with cross sales at commercial rates

BUSINESS DEVELOPMENT

Use services knowledge to spot potential new business opportunities

CLIENT FOCUS

Quality excellence, day to day timely delivery of delegated jobs/small p/folio, spotting cross selling opportunities

PEOPLE MANAGEMENT

LEADING PEOPLE

Contributes to key people development strategies

Evaluates and continually evolves learning opportunities across the business.

MANAGING PEOPLE

completes regular 1:1s and performance reviews

Encourages and gives opportunities to individuals to develop their skills


SUPPORTING OTHERS

Supports others to get the job done

Shares knowledge and provides guidance as appropriate



PATHWAY 6

 Click the cog symbol to take you to the relevant training courses page.



**EXPERT/
SPECIALIST**

REVIEWER

PREPARER

TECHNICAL

TECHNICAL AUTHORITY
Has a unique specialism, anticipates impact of technical changes to manage commercial risk.

TECHNICAL SPECIALIST 
Deals with complex technical areas within their field of specialism, minimising risk and meeting legislative and client needs

TECHNICAL GENERALIST 
Up-to-date on technical knowledge & developments and applies it effectively

SERVICE DELIVERY

SHAPING BUSINESS QUALITY STRATEGY
Determines and delivers change to processes aiming for optimum service levels

WORKFLOW
Oversees production of work through their area of service ensuring timely delivery of work

RESOURCE
Advises on resource needs and acts on needs, recruiting and outsourcing as required

MANAGING EXCELLENT SERVICE
Seeks out and implements improvement opportunities, resolves issues, provides alternatives for excellent service delivery

EXCELLENT SERVICE
Identifies opportunities to improve operational processes and highlight/reduce business risk

WORK EFFICIENCY
Completion of jobs to agreed timescales or highlights any issues promptly

CLIENT FACING

BUSINESS DEVELOPMENT 
Large complex projects, significant new clients. Input into annual business development plan and targets

ACCOUNT MANAGEMENT
Drives growth and service plan as trusted adviser with significant profitable cross-sale penetration

BUSINESS DEVELOPMENT 
Networking, new projects, new leads for prospects/new business

PORTFOLIO MANAGEMENT
Manage delivery of own portfolio with cross sales at commercial rates

BUSINESS DEVELOPMENT 
Use services knowledge to spot potential new business opportunities

CLIENT FOCUS
Quality excellence, day to day timely delivery of delegated jobs/small p/folio, spotting cross selling opportunities


PEOPLE MANAGEMENT

LEADING PEOPLE
Contributes to key people development strategies
Evaluates and continually evolves learning opportunities across the business.

MANAGING PEOPLE
Completes regular 1:1s and performance reviews
Encourages and gives opportunities to individuals to develop their skills

SUPPORTING OTHERS
Supports others to get the job done
Shares knowledge and provides guidance as appropriate

PATHWAY 7

 Click the cog symbol to take you to the relevant training courses page.



**EXPERT/
SPECIALIST**

REVIEWER

PREPARER

TECHNICAL

TECHNICAL AUTHORITY 
has a unique specialism, anticipates impact of technical changes to manage commercial risk.

TECHNICAL SPECIALIST 
Deals with complex technical areas within their field of specialism, minimising risk and meeting legislative and client needs

TECHNICAL GENERALIST 
Up-to-date on technical knowledge & developments and applies it effectively

SERVICE DELIVERY

SHAPING BUSINESS QUALITY STRATEGY
Determines and delivers change to processes aiming for optimum service levels

WORKFLOW
Oversees production of work through their area of service ensuring timely delivery of work

RESOURCE
Advises on resource needs and acts on needs, recruiting and outsourcing as required

MANAGING EXCELLENT SERVICE
Seeks out and implements improvement opportunities, resolves issues, provides alternatives for excellent service delivery

EXCELLENT SERVICE
Identifies opportunities to improve operational processes and highlight/reduce business risk

WORK EFFICIENCY
Completion of jobs to agreed timescales or highlights any issues promptly

CLIENT FACING

BUSINESS DEVELOPMENT 
Large complex projects, significant new clients. Input into annual business development plan and targets

ACCOUNT MANAGEMENT
Drives growth and service plan as trusted adviser with significant profitable cross-sale penetration

BUSINESS DEVELOPMENT 
Networking, new projects, new leads for prospects/new business

PORTFOLIO MANAGEMENT
Manage delivery of own portfolio with cross sales at commercial rates

BUSINESS DEVELOPMENT 
Use services knowledge to spot potential new business opportunities

CLIENT FOCUS
Quality excellence, day to day timely delivery of delegated jobs/small p/folio, spotting cross selling opportunities

PEOPLE MANAGEMENT

LEADING PEOPLE
Contributes to key people development strategies

Evaluates and continually evolves learning opportunities across the business.


MANAGING PEOPLE
completes regular 1:1s and performance reviews

Encourages and gives opportunities to individuals to develop their skills

SUPPORTING OTHERS
Supports others to get the job done

Shares knowledge and provides guidance as appropriate

PATHWAY 8

 Click the cog symbol to take you to the relevant training courses page.



**EXPERT/
SPECIALIST**

REVIEWER

PREPARER



PATHWAY 9

 Click the cog symbol to take you to the relevant training courses page.





EXPERT/ SPECIALIST

TECHNICAL

TECHNICAL AUTHORITY

Has a unique specialism, anticipates impact of technical changes to manage commercial risk.

SERVICE DELIVERY

SHAPING BUSINESS QUALITY STRATEGY

Determines and delivers change to processes aiming for optimum service levels

WORKFLOW

Oversees production of work through their area of service ensuring timely delivery of work

RESOURCE

Advises on resource needs and acts on needs, recruiting and outsourcing as required

CLIENT FACING

BUSINESS DEVELOPMENT

Large complex projects, significant new clients. Input into annual business development plan and targets

ACCOUNT MANAGEMENT

Drives growth and service plan as trusted adviser with significant profitable cross-sale penetration

PEOPLE MANAGEMENT



LEADING PEOPLE

Contributes to key people development strategies

Evaluates and continually evolves learning opportunities across the business.

REVIEWER

TECHNICAL SPECIALIST

Deals with complex technical areas within their field of specialism, minimising risk and meeting legislative and client needs

MANAGING EXCELLENT SERVICE

Seeks out and implements improvement opportunities, resolves issues, provides alternatives for excellent service delivery

BUSINESS DEVELOPMENT

Networking, new projects, new leads for prospects/new business

PORTFOLIO MANAGEMENT

Manage delivery of own portfolio with cross sales at commercial rates



MANAGING PEOPLE

completes regular 1:1s and performance reviews

Encourages and gives opportunities to individuals to develop their skills

PREPARER

TECHNICAL GENERALIST

Up-to-date on technical knowledge & developments and applies it effectively

EXCELLENT SERVICE

Identifies opportunities to improve operational processes and highlight/reduce business risk

WORK EFFICIENCY

Completion of jobs to agreed timescales or highlights any issues promptly

BUSINESS DEVELOPMENT

Use services knowledge to spot potential new business opportunities

CLIENT FOCUS

Quality excellence, day to day timely delivery of delegated jobs/small p/folio, spotting cross selling opportunities



SUPPORTING OTHERS

Supports others to get the job done

Shares knowledge and provides guidance as appropriate

TRAINING SUITE



ENTRY LEVEL OR PROBATION (From 1 years service)

Building personal confidence and assertiveness

Time Management and personal effectiveness

Managing stress and resilience

Developing influencing skills

Negotiation skills

Confident public speaking skills

Customer service skills

Introduction to excel

Introduction to powerpoint

Introduction to word

Understanding social media for business

Introduction to TEAMS

Introduction to IRIS

First Aid at work or First Aid refresher

Manual handling

Fire Steward

Introduction to marketing skills

CIM certificate in marketing (MARKETING ONLY)

ASPIRING OR INTERMEDIATE LEVEL (From 1 years service)

Conflict resolution

Communication skills - understanding personality

Presentation skills

Creative thinking techniques

Interviewing and recruitment skills

Intermediate skills on powerpoint

Intermediate skills on excel

Intermediate skills on word

Intermediate skills on Social Media for business

Intermediate skills on IRIS

CIM advance certificate in marketing (MARKETING ONLY)

CPP certificate in personnel practice (HR ONLY)

IDM digital marketing skills (MARKETING ONLY) writing

EXPERT LEVEL (From 2 years service)

Advanced skills on powerpoint

Advanced skills on excel

Advanced skills on word

Advanced skills on Social Media for business

Advanced skills on IRIS

CIM diploma in marketing (MARKETING ONLY)

CIPD post graduate diploma in HR (HR ONLY)

SUPPLEMENTARY LEARNING

(Search for subject matter and shares links with colleagues)

- Podcasts
- LinkedIn white papers
- TED talks
- Seminars
- YouTube Videos

CPD AND ACADEMIC TRAINING

- Apprenticeship in Business Administration
- CPD specific to HR and payroll (HR only)

PREPARER (From 1 years service)

Building personal confidence and assertiveness

Time Management and personal effectiveness

Managing stress and resilience

Developing influencing skills

Negotiation skills

Introduction to excel

Introduction to powerpoint

Introduction to word

Understanding social media for business

Introduction to TEAMS

Introduction to IRIS

First Aid at work or First Aid refresher

Manual handling

Fire Steward

REVIEWER (From 1 years service)

Conflict resolution

Communication skills - understanding personality

Creative thinking techniques

Interviewing and recruitment skills

Intermediate skills on powerpoint

Intermediate skills on excel

Intermediate skills on word

Intermediate skills on Social Media for business

Intermediate skills on IRIS

Report writing

EXPERT (From 2 years service)

Management planning and strategy creation

Advanced report writing

Advanced skills on word

Advanced skills on Social Media for business

Advanced skills on IRIS

Advanced skills on excel

SUPPLEMENTARY LEARNING

(Search for subject matter and shares links with colleagues)

- Podcasts
- LinkedIn white papers
- TED talks
- Seminars
- YouTube Videos

CPD AND ACADEMIC TRAINING

- CPD and technical updates on Mercia as recommended by your manager in one to one reviews
- Academic training - AAT, ATT, ACCA, ACA, CTA
- Project management skills eg. PRINCE 2 AGILE SCRUM or general overview

PREPARER (From 1 years service)

- Understanding exceptional customer service skills
- Dealing with client objections
- Negotiation skills
- Developing influencing skills
- Confident public speaking skills
- Effective presentation skills
- Networking and personal confidence skills
- Time management and personal effectiveness
- Understanding client's personality

REVIEWER (From 1 years service)

- Developing effective sales process
- Creating client proposals documents
- Effective presentation skills
- Networking and personal confidence skills
- Conflict resolution
- Time management and personal effectiveness
- Story telling, benefits and value
- Managing stress and resilience

EXPERT (From 2 years service)

- Account management skills
- Advanced presentation skills
- Advanced negotiation skills
- Writing to sell
- Developing client strategy
- Marketing skills
- Using social media for business development

SECTOR SPECIFIC (Any level)

- Accountancy for professional services
- Accountancy for retail
- Accountancy for startups
- Accountancy for freelance and self employed
- Accountancy for SME
- Accountancy for blue collar
- Accountancy for hospitality
- Accountancy for Medical
- Accountancy for agriculture
- Accountancy for tourism
- Accountancy for motor trade
- Accountancy for public figures
- Any other sector specific

SUPPLEMENTARY LEARNING (Search for subject matter and shares links with colleagues)

- Podcasts
- LinkedIn white papers
- TED talks
- Seminars
- YouTube Videos

CPD AND ACADEMIC TRAINING

- CPD and technical updates on Mercia as recommended by your manager in one to one reviews
- Academic training - AAT, ATT, ACCA, ACA, CTA
- Project management skills eg. PRINCE 2 AGILE SCRUM or general overview

PEOPLE MANAGEMENT

PREPARER (From 1 years service)

Step in to supervision and management - foundation level

REVIEWER (From 1 years service)

Introduction to management

Managing Performance and Motivation

Effective 1-1 reviews and appraisals

Managing personal effectiveness and time management

Managing communication and personality

Building managers confidence and resilience

Managing People remotely

EXPERT (From 2 years service)

Management planning and strategy creation

Understanding influence and leadership

Managing conflict and relationships

Developing coping and mentoring skills

Understanding culture and change

Presentation and public speaking skills

IOD Institute of Directors Membership

MBA qualification

SUPPLEMENTARY LEARNING

(Search for subject matter and shares links with colleagues)

- Podcasts
- LinkedIn white papers
- TED talks
- Seminars
- YouTube Videos

CPD AND ACADEMIC TRAINING

- Oxford School of Mentoring and coaching
- NLP - Neuro linguistic programming
- Personality profiling eg. Myers Briggs and Disc
- Psychometric testing for numeracy, literacy and accuracy (for recruitment)
- Project management skills eg. PRINCE 2 AGILE SCRUM or general overview