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| --- | --- |
| **Title: Marketing Assistant** | **Band:**  1 |
| **Department: Customer First  Location: Birmingham** | **Last updated: June 2021** |

**1. Purpose of the role:**

The **Marketing Assistant** will be varied, offering the experience of working on multiple projects, new product launches, collaborating with product and sales teams, providing wider support across the Customer First function. The role will provide a unique opportunity to create online/ offline content, looking at current trends.

**2. Responsibilities**

* Work with the agency to produce collateral, including general marketing literature/ Key Features Documents. Write Agency brief, manage the regulatory approvals following BCOB regulations.
* Support the Digital and Social Media Marketing Manager with the production of ‘How to’ video’s and ‘Testimonial’ videos.
* Managing Regulatory emails, direct mail and tactical marketing campaigns, together with monthly Statement Messaging
* Review and rewrite Unity Trust Bank suite of customer letters/ standard communications, working closely with the Unity Connect team
* Research and share marketing trends
* Customer complaints: own customer complaint letters (holding letter, status letter, resolution letter), ensuring high quality written communication, consistent with TOV. Providing independent oversight of complaints investigations and feedback when appropriate

**3. Organisational fit** (structure chart attached separately if necessary)

The role reports to – Head of Proposition and Brand

**4.  Parameters of the role**

Refer to Authority Levels contained within the latest ‘Master Authorisation Limits’  document held on the Shared drive > Authorisations

Note: This document is maintained by Human Resources.

**5. Risks and controls**

* Ensures that treating customers fairly is at the heart of everything we do, both personally and as an organisation. This is achieved by consistently operating to the highest ethical standards aligned to the founding principles of the Bank, as well as understanding that the Bank will at all times seek to protect its reputation.
* Continually reassesses the operational risks associated with the role and inherent in the business, taking account of changing economic or market conditions, legal and regulatory requirements, operating procedures and practices, people reorganisation and the impact of new technology. This is achieved by ensuring that all actions take account of the likelihood of operational risk occurring and by addressing any areas of concern with line management and/or the appropriate department.
* Demonstrates adherence to, internal controls. This is achieved by adherence to all relevant procedures, keeping appropriate records and by the timely implementation of internal or external audit points and any issues raised by the external regulators.
* In conjunction with Risk and Compliance function, adhere to the Bank’s Policies and Procedures by containing Compliance risk (this embraces all relevant financial services laws, rules and codes with which the business is required to comply). This is achieved by adhering to all relevant processes/procedures and by liaising with the Risk and Compliance function regarding risk events at the earliest opportunity. Also, when applicable, by ensuring that adequate resources are in place and training is provided, fostering a Compliance culture and optimising relations with the Regulators.

**Role subject to regulatory approval** – No

**Other requirements specific to the role**

This is not a strict 9-to-5 job. Market and Business pressures dictate a real need for flexibility.

**PERSON SPECIFICATION**

(E = essential D= desirable)

**Professional qualifications**

Professional business qualification, degree level or equivalent (D)

**Knowledge requirements (and how this is typically gained)**

* 2+ years on and offline multi-channel marketing experience, ideally in B2B, Financial Services or Fintech, with an understanding of Marketing principles
* Good verbal and written communication skills as well as good copywriting skills
* Experience of working with an in house or external agency; brief writing, managing copy and creative
* Can do attitude and strong interpersonal and collaborative skills
* Strong attention to detail and organizational skills
* A strong team player - essential but with a capacity for self- management

Specific UX and CX experience in Financial Services (E)

**Skills required (see Skills Framework)**

**LEVEL**

|  |  |
| --- | --- |
| **LEADERSHIP** | **1** |
| > |  |
| **CUSTOMER SERVICE & SALES** | **1** |
| > |  |
| **SYSTEMS/IT SKILLS** | **1** |
| > |  |
| **PROCESSING SKILLS** | **1** |
| > |  |

**Skills Framework**

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| --- | --- | --- | --- | --- |
|  | (High)  4 | 3 | 2 | 1 (Low) |
| **Leadership** | Head of function:  Communicates to inspire & motivate, builds teams,  represents the Bank’s views & interests externally | Manages people:  Communicates to manage performance, regularly presents,  sets standards and priorities | Team leader/coach:  Communicates to guide and develop colleagues on the job | Individual contributor:  Team member, effective communication skills, demonstrates initiative |
| **Customer Service & Sales** | Sales management:  Role model for highest levels of customer service  Manages sales activity towards targets | External customer sales  Understands how to achieve sales targets via needs based selling skills | External customer service  Able to meet external customer requests providing a service level which delights | Meets requirements of internal customers, understands department’s SLA’s and impact of these on others |
| **Systems/IT skills** | Requires highly technical systems skills to develop systems architecture | Requires advanced knowledge of specialist systems, adapts these to meet the needs of the business | Requires advanced Microsoft Office skills, produces complex reports from specialist system | Requires standard Microsoft Office skills or basic level of specialist system (data input/look ups) |
| **Processing skills** | Complex analysis of data & report production with recommendations & business acumen. Sets policies, produces reports for external use | Advanced administrative skills requiring analysis, research, investigation, report writing, some decision making required | Skilled administration required– free format letter writing, minute taking, some analysis & judgement required | Basic verbal and numerical reasoning to administer standard letters/forms accurately, prioritises work to meets deadlines & service level agreements |