

Job Description

Job Title: Interim Resource Manager

Department: BWB Compliance

Reports to: Head of Department/COO

Direct reports: None initially

Job Purpose:

Your role is to proactively managing the pipeline of work and the capacity of the team members within our busy consultancy, as well as taking over other operational management tasks that will free up the time of those delivering client work.

We're a small team but having established two and half years ago we have grown considerably, both in terms of the volume of work and the number of individuals within the team. We need someone who can develop an understanding of our work, our commercial drivers and the skillsets of the team to help us strategically forecast and manage our work.

As we grow and develop our work, we are keen to adapt the ways we do things, building our framework for consistency and efficiency. This role is key to that development and there is plenty of scope for helping us to do things better.

BWB Compliance provides regulatory advice to financial services clients and these span asset managers, wealth managers, and financial advisers through to crowdfunding platforms, P2P lending platforms, and challenger banks. Given BWB's ethos we are particularly interested in working with clients who are using financial services to make a difference, whether that is to create growth, social impact or to change the way that finance works for the better.

As a B-Corp we judge ourselves not only by profit but also by the impact we have on society, the environment and our people.

What work can I expect to do?

The pipeline of work originates from numerous sources, often with little notice, and so schedules and planning needs to regularly be reviewed. The team offers a retainer service to a variety of clients who can ask advice and support at any time, which means that the team handles a multitude of small projects alongside significant long term projects and initiatives. The team also has a strong pipeline of new clients approaching the business for work and the Resource Manager will oversee this process to ensure that this feeds into the overall pipeline and capacity assessment, as well as to make sure that our internal on boarding processes are followed.

The team is entrepreneurial and collegiate and will be looking for someone who is comfortable in a fast paced environment, with a can-do attitude. The Resource Manager also needs to be a safe pair of hands in managing the risks associated with the pipeline and will need to develop a deep understanding of the different types of work we undertake and our resource demands in order to maximise their effectiveness in role.

The team itself is multi-disciplinary with different individuals having responsibility for different sections of the financial services market as well as different regulatory specialisms. The Resource Manager will need to understand and track individual Fee Earner experience, capability, development goals and availability, liaising with line managers as appropriate.

The Resource Manager will also need to develop an understanding of the key financial and other commercial drivers of our practice and ensuring all of their management activities are aligned with that.

Key responsibilities and duties include:

As this is a new role there is scope to develop responsibilities around the skills, experience and capacity of the person selected. The following represents a list of responsibilities that we consider to be central to the role:

Primary duties:

- Managing and forecasting our pipeline of work which originates from numerous sources including clients, other teams with BWB, external events such as regulatory changes, and the team's own business initiatives.
- Managing capacity within the team to ensure we have capacity within the right individuals to promptly and skilfully deliver the work we commit to. This will occasionally involve directing the reallocation of work between team members and also requests for leave and homeworking.
- Managing our use of, and relationships with, third party
- Tracking our new leads from engagement to conversion, including the oversight of the onboarding process which includes risk assessments, proposals and engagement letters
- Holding daily stand-ups/ huddles with the team to identify obstacles and taking steps to remove the obstacles
- Helping to develop best practice and consistent approaches to ensure maximum operational and commercial efficiencies

Other duties (according to available time)

- Developing and monitoring of the team Management Information
- Project management for occasional larger projects including budget and timeframe management
- Coordinating team training and our knowledge bank so that the team has easy access to knowledge, precedents and guidance.
- Holding post project 'retrospectives' to learn lessons from our delivery and to incorporate these into our team guidance and any other internal documents such as pricing models
- Involvement in our content creation and website/ social media management
- Taking initial calls with potential new clients to identify and filter
- Involvement in business development activities, including attendance at events or pitches for work, and helping to design and manage our new initiatives
- Client liaison role in relation to larger projects
- Liaison with other departments within BWB and representing the consultancy within firm-wide meetings

Person Specification

- Experience of resource planning, ideally within a fast paced, reactive environment
- Strong organisational skills, eye for detail and excellent prioritisation capability
- Experience within a consultancy or another environment where the client base is made up of professional clients
- Excellent interpersonal communication skills and an ability to communicate effectively at all levels
- Superb judgment and a proven ability to make decisions that balance business risk and opportunity
- Self-starter who takes the initiative, with a 'can do' attitude and a willingness to get stuck in
- Team player, who can get the best out of others and builds trust and loyalty
- Comfortable in an entrepreneurial environment
- Proactive and resilient approach
- Commitment to the success of the firm
- Understanding of and commitment to BWB's values and ethos
- Proven ability to deal with confidential matters and with discretion
- Comfortable using technology including SAAS and excellent Word and Excel skills