

POST TITLE: Finance Service Desk Consultant

Attribute	Essential	Desirable	How Identified
Previous Experience	<ul style="list-style-type: none"> ▪ Experience of working within the finance sector, Sound financial expertise, with the ability to communicate and clarify complex financial issues. ▪ High level of computer and numerical literacy, including packages such as excel and word ▪ Good understanding of accounting practices ▪ Ability to learn multiple finance systems to support school queries ▪ Ability to demonstrate knowledge and understanding of various systems ▪ Experience within professional customer focused environment 	<ul style="list-style-type: none"> ▪ Experience of using or supporting RM Finance, FMS, Civica, PS Financials or Sage ▪ Experience of education finance and education accounting practices ▪ Working in or supporting schools/academies. ▪ Ability to train others ▪ Knowledge and understanding of school budgeting and forecasting or other relevant experience ▪ Experience of CRM or service desk systems 	A/I
Qualifications/ Training	<ul style="list-style-type: none"> ▪ Good standard of education; Minimum 5 GCSEs or equivalent, including English & Maths. 	<ul style="list-style-type: none"> ▪ CSBM, DSBM, AAT, ACCA, CIPFA ▪ Customer service qualifications or experience ▪ Degree or equivalent level qualification 	A
Specialist Skills /Aptitudes	<ul style="list-style-type: none"> ▪ Focus – The ability to remain focused on what is important to the business despite distractions. Commitment to team/department/company; understanding the service desks role in the company ▪ Problem Solving – The ability to identify and resolve problems quickly and effectively. Understands entire process from logging to informing customer solution is in place; knows when to escalate; implements solutions not fixes. ▪ Proactive Thinking – The ability to take initiative to make improvements. Anticipate customer needs; looks for ways to make things better for the 	<ul style="list-style-type: none"> ▪ Experience of working in a school environment ▪ Or willingness to undertake training in multiple finance systems 	A/I

	<p>customer, to eliminate recurring problems, and recurring calls.</p> <ul style="list-style-type: none"> ▪ Communication – Speaks clearly and persuasively in positive or negative situations. Listens and gets clarification of requests. Responds well to questions. Ability to interact and communicate clearly with people over the telephone, often in stressful situations. Writes clearly and informatively. Edits work for spelling and grammar. ▪ Customer Skills – The ability to interact with customers in a polite and professional manner. Regards customer as the most important part of job; respectful of customers and manages difficult customer situations. Responds promptly to customer needs and requests for service and assistance. ▪ Professionalism – Uses time efficiently. Approaches others in a tactful manner. Treats others with respect and consideration regardless of their status or position. Accepts responsibility for own actions. ▪ Teamwork - Contributes skills and capabilities to achieve the team’s goals. Is receptive to new ideas, builds strong working relationships. ▪ Flexibility - Performs a wide range of tasks, responding to changes in direction and priorities. Accepts new challenges, responsibilities and assignments. Works outside of ordinary routine. Adjusts to multiple demands and priorities. Utilises new and unique methods to resolve issues. Possesses versatility demonstrated through 		
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	<p>performance and/or some experience in multiple skill sets.</p> <ul style="list-style-type: none"> ▪ Team/Company Fit – Absolutely always on time; enjoys working in a casual environment in terms of relationships and communication; willing to work over time; doesn't need any hand holding. ▪ Systems Focused – ability to learn multiple education finance systems 		
Disposition/ Attitudes	<ul style="list-style-type: none"> ▪ Professional, friendly and approachable manner. ▪ Commitment to maintain a current knowledge of the financial environment. ▪ Commitment to personal development. ▪ Ability to build and sustain relationships. ▪ Resilient and adaptable to changing situations and circumstances. ▪ Flexibility ▪ Able to demonstrate excellent interpersonal skills ▪ Adaptable ▪ Diligent and rigorous in approach to work ▪ Supportive of Team members ▪ Transparent in approach ▪ Ability to be discrete and confidential 	<ul style="list-style-type: none"> ▪ A sense of humour ▪ Ability to build and sustain client relationships ▪ Interest in business development and sales opportunities 	I
Working Arrangements	<ul style="list-style-type: none"> ▪ Willingness to attend school sites to carry out bursarial or consultancy visits if required. 	<ul style="list-style-type: none"> ▪ Willingness to work outside office hours as required. ▪ Willingness to work remotely if required. 	A
Other Criteria	<ul style="list-style-type: none"> ▪ Willingness to undertake a DBS check 		A