



# Pacem

## Client Experience Specialist Role Information Booklet



## Pacem

As one of Northern Ireland's leading Financial Advisory Firms, Pacem is a boutique Practice which offers a unique Financial Planning & Accountancy Business Advisory service. As a company we are people focused and we have a very close relationship with our clients. Our culture is that we want all team members to realise their potential and we provide this through mentoring and coaching. We promote employee well-being and a supportive team working ethos in line with company values and objectives.



- Our team has grown from 7 people to 20 people.
- In our Financial Planning business our client Assets under Management have grown from £23 million in 2016, to £120 million at present.
- We have over 500 clients across the firm.
- Pacem won East Belfast's 'Employer of the Year' award 2020 & 2022. Irish News 'Best Wellbeing in the Workplace' 2024
- We're delighted to be shortlisted for 'Family Business of the Year' at the Belfast Chamber Business Awards 2023
- Pacem focuses on working with small to medium sized business owners to provide a coordinated financial plan to provide for both their personal and business needs.



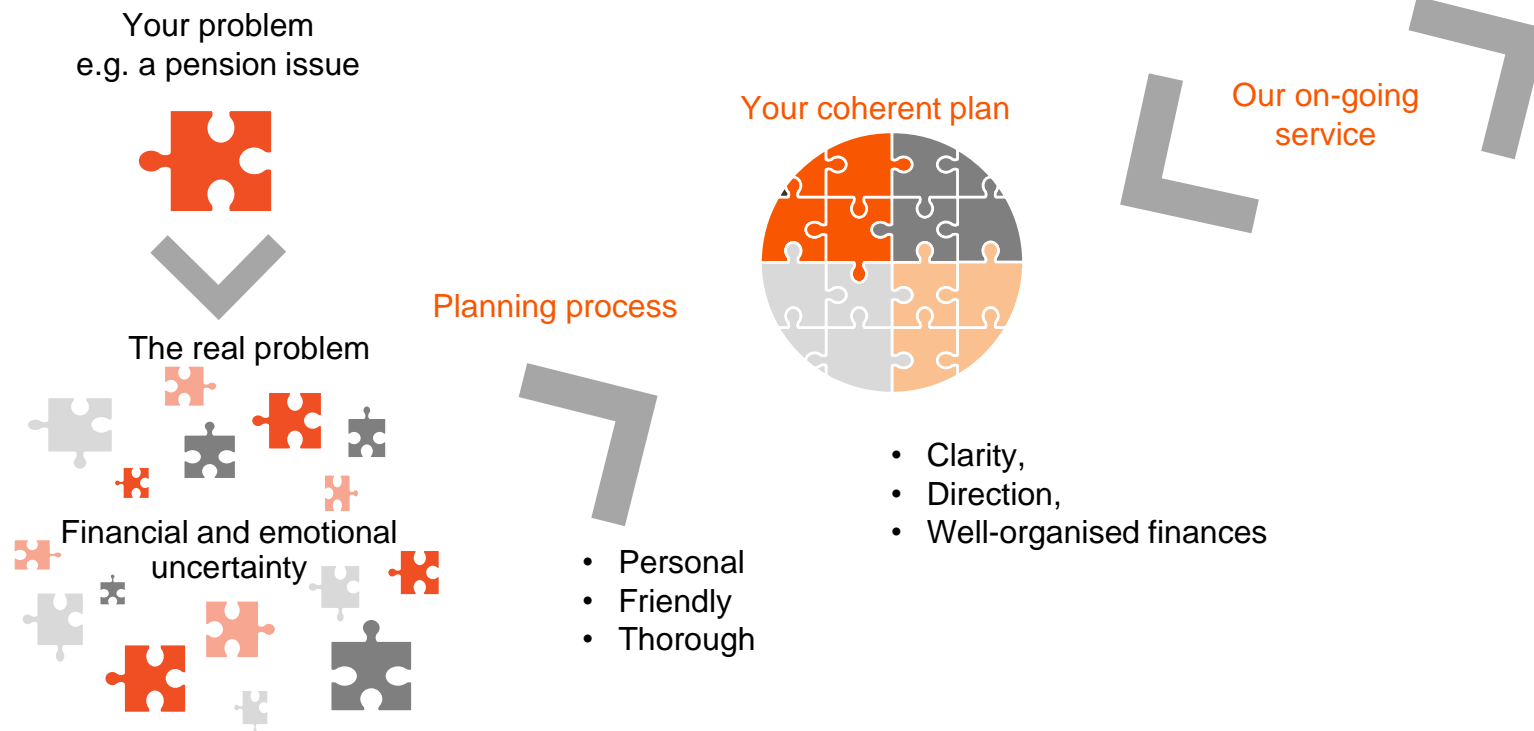
## Pacem Financial Advisory

- A client often comes to us with what they feel is a pressing problem e.g. a pension issue.
- While trying to solve this issue with them, it's our job to work out the range of financial issues they face in life which they maybe haven't realised exist yet or they are not yet focusing on.
- Once discussed, we prepare a coherent plan to provide clarity and direction to provide peace of mind about their future.
- As part of our ongoing service, we review these objectives and issues on an annual basis.

### The value we deliver

Total peace of mind about your finances and your future.

- Secure
- Relaxed
- Confident



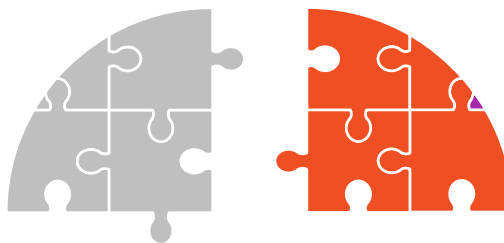
## Pacem Financial Advisory

- In each client's plan, there are 4 key areas of financial advisory, as outlined below.

### Financial plan

Lifetime cashflow planning:

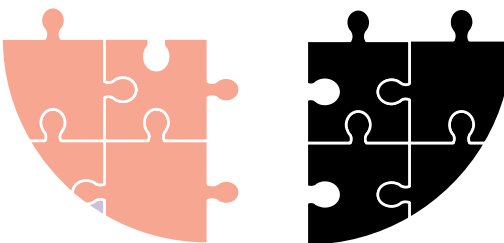
- a) Are your assets sufficient to meet your goals?
- b) What choices do you have?
- c) What trade-offs will you make?



### Contingency plan

Planning for the known unknowns:

- a) Long-term care
- b) Premature death
- c) Illness



### Investment plan

Your current portfolio:

- a) Suitable?
- b) Well structured?
- c) Understandable?

### Tax plan

Are your affairs tax efficient?\*

- a) Tax reliefs maximised?
- b) Asset location effective?
- c) IHT planned for?

\* We only work within the common and wholly acceptable tax efficiency planning opportunities afforded by HMRC

## Pacem Accounting & Tax Advisory

Pacem also has an Accounting & Tax Advisory service as summarised below:

### *Accountancy Essentials*

**Real-time, bespoke, personal and precise...** Our book-keeping, compliance and accountancy essentials service provides clients with **clarity, insight and peace of mind.**







- ☒ Cloud Accounting Package
- ☒ Payroll
- ☒ Full book-keeping
- ☒ Year-end accounts
- ☒ Personal Tax Planning
- ☒ VAT returns
- ☒ Monthly Management reporting
- ☒ Tax Investigation Service

### *Business Advisory*

From pre-start to exit... providing timely information, **unmatched expertise** and diligent insight where and when it matters... we **add value way beyond the compliance work.**

- ☒ Cashflow Forecasting and Budgeting
- ☒ Risk Management
- ☒ 'What if' Scenario Planning
- ☒ Professional Tax Advice
- ☒ Industry Specific Expertise
- ☒ Succession Planning
- ☒ Business Valuation
- ☒ Strategy and growth



## Why we are a great place to work

-  Great team culture & strong values
-  Passionate about helping clients create the outcomes they want in business life
-  Engaging our team to grow and reach their potential by creating opportunities and a balance of support and challenge.
-  Helping the team live the life they want around work
-  Exposure to a range of business areas, empowerment to collaborate on impactful projects and develop new skill sets
-  Feeling valued through outstanding employee benefits and a great working environment and memorable team events.

## Our Purpose & Our Philosophy

-  To lead the industry in bringing clarity and vision to the business and financial lives of business owners across Ireland, providing a remarkable, innovative service!
-  For our team to have a meaningful, challenging environment to work, develop, grow and contribute, bringing value to their lives!
-  In achieving this, we believe we can make an Impact on our community, the sustainability of our planet and our environment, our people and wellbeing and we can help to empower enterprise.

## What's the real opportunity here?

-  Being a key team member supporting the Directors and wider team operations in a growth orientated business.
-  Be instrumental to designing and delivering Pacem's bespoke client experience

## Pacem's Core Values

### Core Values

#### Good to Be Around

- Easy to get on with.
- Good to be around, even under pressure.
- Genuinely care about people, takes time to talk to people.

#### Enthusiasm – gets stuck in

- Will do whatever is required.
- Determination to see things through.
- Initiative & commitment to develop.
- Appetite to learn & take on new challenges.

#### Growth mentality – trying to push the boundaries

- To innovate and evolve, looking for the next opportunities.
- Never satisfied and always trying to improve.
- Purpose in our work and our career development.
- Ensuring we all retain the bigger picture and are asking 'why?'

#### Do things the right way, rather than the easy way

- Reliability; complete assurance something will be done and be done right.
- Great organisational skills, attention to detail, and the ability to pull things together.
- Diligence and quality are core to delivering the client service.

#### Proud of Pacem and everything that we do individually and collectively

- Everything matters; we take pride in:
  - Our clients – the work they do and our relationships with them
  - Our team and culture
  - Our office and its environment
  - Our communications (written and verbal)
  - Our social impact and outreach activity
  - Our processes

#### Always thinking about the client

- We appreciate the opportunity and the business our clients create for us.
- We're here to make their lives easier.
- Working hard for our clients - going over and above expectations.
- Having an inquisitive and questioning approach to client work.
- Focusing on the clients' needs and wants and not what suits us best.

## Client Experience Specialist

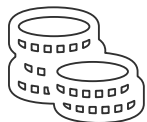
- **Location** - Based at Pacem Advisory Offices, Castlereagh Road, Belfast BT5 6BQ. May be required to visit the Ballymoney Pacem Advisory Office approximately once a quarter.
- **Reports to:** Group Operations Manager
- **Salary** – Competitive (Dependent Upon Experience)
- **Hours** – 36.5 hours per week. (Monday – Thursday 8.30 am – 5 pm & Friday 8.30 am – 1 pm, Friday rota cover) - 4 days office based and 1 day home working per week
- **To Apply** - Please send your C.V. with a cover letter explain why you are applying for the role to [frances.neely@pacem-advisory.com](mailto:frances.neely@pacem-advisory.com) by the closing date of **Monday 17<sup>th</sup> February 2025 @12pm**



# Market Leading Employee Benefits: Pacem Good Job Strategy

## Remuneration

- ✓ Salary
- ✓ 5% Pension Contribution
- ✓ Individual Performance Bonus Eligibility
- ✓ Client Referral Bonus
- ✓ Recruitment Candidate Referral Bonus



## Added Value Benefits

- ✓ Additional Loyalty Days – 20 Days Holidays increasing by 1 Day up to a maximum 5
- ✓ 9 Statutory Days
- ✓ 5 Closure Days (From Annual Leave Allocation)
- ✓ Income Protection
- ✓ Life Cover
- ✓ Working from Home Allowance
- ✓ Enhanced Occupational Sick Pay Scheme
- ✓ Enhanced Parental Leave



## Work / Life & Wellbeing

- ✓ Flexi Time System – Flexible Start/Finish Times
- ✓ Hybrid Working
- ✓ Sabbatical (4 Weeks at 4 Years Service)
- ✓ Unum Health Services – Remote GP, Physio Appt Access
- ✓ Help @ Hand Wellbeing App
- ✓ Team Wellbeing Initiatives
- ✓ Team Events



## Career Growth & Progression

- ✓ Financial Support for Training/Qualifications relevant to role development
- ✓ Conferences
- ✓ Management Mentoring
- ✓ Annual Career Progression Meetings
- ✓ 1:1 Coaching
- ✓ EQI Emotional Intelligence Skills Development



## The Role

The successful candidate will play a central role in driving exceptional client experience and ensuring the smooth operation of Pacem Advisory's office activities. This multi-faceted role encompasses leadership in client experience design, front-of-house duties, and support with office operations.

You will need to be highly organised, proactive, and assertive. You should have the ability to manage and prioritise your workload independently and take ownership and responsibility of it.

The nature of the industry and role is one that is fast paced and dynamic. Therefore, we are looking for an individual with the ability to meet tight deadlines, the ability to multi-task and adapt to change quickly. Who has a positive and professional attitude with the ability to build strong internal and external relationships.

The clients are centric to our business. The ideal candidate should be dedicated to delivering an exceptional customer experience, going above and beyond to meet customer needs and capable of understanding customer needs and tailoring their approach to meet each customers needs & expectations effectively.

## Main Duties Overview

The main duties focus on supporting the team to deliver a professional service that helps the business to provide clients with clarity, insight and peace of mind. This include:

- Leading on designing & delivering an **exceptional** client service experience for our clients.
- Being a welcoming & reliable first point of contact for clients whether in office or via our office phone line.
- Ensuring the seamless operation of the business, working to create an organised and efficient environment that is welcoming for both team and clients.
- Providing additional support in managing the Managing Director's schedule, ensuring meetings and travel arrangements are meticulously planned and executed without fault

## Key Responsibilities & Accountabilities

### Client Experience Lead

- Lead on designing and delivering Pacem's exceptional bespoke Client experience.
- Assessing all aspects and touch points of the client experience and planning, leading and executing concepts.
- Liaise with our Directors, the Marketing Director and Marketing Executive to ensure a brand approach to our client experience.
- Designing client experience that excels our client needs throughout their journey with Pacem including in person and remote hospitality, high quality refreshments, support and information, Christmas Card/Gift,
- Corporate Football Club Tickets, Pacem events information and updates.
- Communicate effectively with the Pacem Team to ensure consistent delivery of an outstanding client experience.

### Client Relationship / Front of House Duties

- Client welcome & greet - Receiving clients at reception as a friendly and professional point of contact for clients and enquiries (by phone, email and in person).
- Showing clients into allocated meeting room and provision of teas/coffees and refreshments.
- Answering, screening and forwarding incoming calls.
- Meeting and greeting clients and other business visitors.
- Smooth coordination of client parking and oversee meeting rooms bookings keeping to time .
- Keeping meeting rooms clean, tidy and stocked.
- Arranging additional facilities needed for Director, Client meetings, Team Lunches (e.g. sandwiches, lunch bookings).

## Office Support Duties

- Assist the Group Practice Manager in with management of daily operational activities, and performing administrative tasks as instructed by management.
- Providing support with operational projects on an ad-hoc basis.
- Assist with identifying operational problems and resolving them in a quickly and timely manner.
- Taking ownership of maintaining a tidy and organized office environment, including ensuring the kitchen is well-stocked and orderly, the meeting rooms are regularly cleaned and presentable, and the wider office remains welcoming and professional for clients.
- Scanning incoming mail to Client Managers, issuing hardcopy documents to be retained.
- Managing outgoing post – Postal register.
- Allocate Client Review Tasks and Ad-Hoc on KanBan workflow system.
- Monitor the company 'Pacem [Info@pacem-advisory.com](mailto:Info@pacem-advisory.com) email inbox.
- Support with back-office system updates.
- Support with new employee Induction Preparation.
- Ordering and maintaining adequate office supplies, stationery and maintenance of office equipment .
- Manage the ordering and maintaining of general office supplies for kitchen and team refreshments.
- Assist with ensuring data security, IT requirements are met.
- Support with the management of all IT services and systems. Keep an up-to-date register of hardware, software.
- Monitor and report on the usage and functionality of IT systems to the [Operations Director].
- Other duties as directed by management.

## Additional Operational Support

- Provide Personal Assistant support to the Pacem's Managing Director & Director Of Accountancy & Tax.
- Effective diary management.
- Scheduling professional and personal appointments if required.
- Scan and file Directors and Financial planner meeting notes.
- Book meeting rooms, issue meeting papers and ensure equipment required is available.
- Check email calendar for other Directors' and team member to facilitate the planning of events/meetings.
- Confirm client appointments.
- Preparation of documents in line with company branding, policies and delivered within timescales.
- Arrange travel, accommodation for Directors and team members.
- Raise and resolve IT issues with IT support team.
- Zoom meeting link set up.

## Essential Requirements

- 1 year's previous full-time experience of working in customer facing role in an environment with high quality/levels of customer / client service including; Professional Business Practices or 4/5-star Hotels or equivalent relevant experience.
- 1 year's full-time administration experience, from professional business or hospitality background
- Have 5 GCSE's (grades A-C) including English and Maths.
- High levels of organisation, the ability to plan, prioritise and multitask.
- Effective communication skills for interacting with internal and external contacts.
- Excellent spoken and written communication, and self-presentation when interacting with clients.
- Proven customer relations skills.
- Excellent teamwork approach.
- Adaptable and flexible to embrace changing business needs.
- Have a confident telephone manner and be able to speak directly to external organisations .
- Experience of working pro-actively and using own initiative to complete tasks.
- Highly proficient in utilising computer systems, software, and tools relevant to customer support operations.
- Proactive and diligent approach to tasks.
- The ability to work and think independently to solve problems as they arise.
- Be professional, energetic and dependable.
- Attention to detail.
- Ability to work with a high level of confidentiality and sensitivity.

## Desirable Requirements

- 2 years full-time office administration experience.
- Degree/ HND/HLA in Hospitality or Business Management.
- Have a strong working knowledge of Microsoft Office packages.
- 2 year's previous full-time experience of working in customer facing role in an environment with high quality/levels of customer / client service including; Professional Business Practices or 4/5-star Hotels or equivalent relevant experience.

## Contact Us

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