



August 2023

Job Description

Title: Talent & Development Manager

Company: Wren Sterling Financial Planning Limited

Reports To: Director of HR

Company Overview

Wren Sterling is a progressive UK-wide independent financial advice business. In complex markets that change frequently, we help our Corporate and Personal clients make the right financial choices through the provision of independent financial advice which is uniquely tailored to their specific needs. Wren Sterling specialises in all aspects of savings, investments, and retirement planning to individuals. Through successful partnerships with Building Societies, we deliver independent financial advice to their customers. For corporate clients we provide advice on engaging employees through the provision of group risk, protection, and other employee benefit solutions.

Role Outline

The Talent & Development Manager is responsible for managing all aspects of development that fall outside of FCA regulated T&C requirements, specifically focusing on developing the emerging talent strategy and supporting the various career paths throughout the business. This role will manage the critical development pathways within the business to facilitate career development via remote learning and face to face interventions, student placements, apprenticeships and managing existing talent. This wide-ranging role will also support the integration of acquisitions, providing support to transferring employees in the transition to WS processes.

Qualifications

Essential:

- 5 GCSE's or equivalent (including Maths and English)
- CIPD Level 3 Training Certificate (or equivalent)

Desirable:

- Attainment of or studying towards Level 4 Diploma in Regulated Financial Planning 'or' qualifications equivalent
- Associate Diploma in Organisational Learning and Development

Role Competencies

	Influencer	Achiever	Developer
Business Ethics		X	
Communication	X		
Organisation		X	
Customer Service		X	
Leadership		X	
Teamwork		X	
Technology	X		
Expertise	X		

Principle Objectives & Responsibilities

Principle Objectives and Responsibilities include the following, other objectives may be assigned:

- Working with the Director of HR, define the WS annual L&D programme for existing employees following organization wide Training Needs Analysis process.
- Working with the Integration Team, support all acquisitions by providing face to face and remote training of WS processes & policies to support the integration of transferring employees.
- Working with the Director of HR, implement talent mapping and succession planning at all levels of the business.
- Design, manage and develop all online training content on SharePoint to support our business strategy and mandatory training requirements for working within a FCA regulated environment.
- Manage the WS apprenticeship programme, providing development routes and succession planning for key roles within Operations and candidates for the Financial Services Academy.
- Working closely with Adviser Development Managers, support colleagues going through the Financial Services Academy as required.
- Working closely with Managers at all levels, develop and deliver L&D interventions across all formats to support training needs for financial planning knowledge, skills and soft skills training.
- Working with Executive Directors, ensure that the Competency Framework is maintained and accurately reflects competencies, skills and knowledge required within each business area.
- Manage all aspects of Student Placements, from attraction (via 'milk round' process at universities local to WS Offices) to developing a programme for placements that provides a meaningful insight into a career with the Financial Services Industry.
- Manage the booking of training requests for training and professional qualifications, ensuring that requests are reviewed and approved by the Director of HR and Chief Executive Officer.
- Develop content for the L&D Hub and provide consultancy support for all areas of the business on the development and delivery of training materials.



- Responsible for the implementation and day to day management of a Learning Management System, ensuring that data is managed according to GDPR Policy.
- Provide Management Information of L&D activity as required.
- Manage new starter induction process for all new employees.
- Promote professional behaviour by demonstrating courtesy and respect to all colleagues and following the Company's equality and diversity policy at all times.
- Ensuring health and safety policies are observed. Completion of other reasonable duties, as defined by the Senior Management Team.

Knowledge Required

- Knowledge of implementing organization wide training needs analysis.
- Have detailed understanding of WS process and policies.
- Understanding of Apprenticeship and Technical & Vocational Education and Training (TVET) RQF framework is desirable but not essential.
- Basic knowledge of FCA Continuous Professional Development requirements

Skills Required

Essential skills:

- IT literate, including all Microsoft Packages.
- Confidence to develop strong, sustainable relationships with candidates, colleagues and senior managers.
- Excellent presentation skills.
- Training, development and coaching of employees.
- Excellent written and verbal communication and influencing skills.
- Self-motivated.
- Customer focused.
- Analytical skills.
- Problem solving.
- Decision-making.
- Change management & leading change.
- Ability to efficiently manage priorities and workloads.
- Ability to meet strict deadlines.

Desirable Skills:

- Financial Planning skills
- Basic understanding of Power BI Reporting Package

Key performance Indicators

The performance of the staff member assigned to this job role function shall be measured by:

- Delivery of the WS annual L&D programme.
- Individual / Team meets financial targets, KPIs and SLAs.
- Internal and external customer satisfaction measures.
- Feedback from senior colleagues, advisers and team members.
- Adherence to all company policies and procedures.
- Adherence to compliance and other legal regulatory processes.

The above statements are intended to describe the general nature and level of work being performed by the person taking the role of this job. They are not intended to be an exhaustive list of all responsibilities and activities required of the position.

