

illuminate

head of casework teams

Financial Ombudsman Service

November 2011



Financial
Ombudsman
Service

leadership, motivation and vision ...

I'm delighted that you're interested in the ombudsman service. If you're reading this, you're probably wondering "is this the right career move for me?" So let me tell you a bit more about us – and about the role of our heads of casework teams.

I joined the ombudsman service at the start of 2010. Never having used the service – and being new to financial services – I didn't know a lot about the ombudsman before seeing the job advert. But the more I read, the more interested I became. Now, over 18 months later, I'm delighted that I joined. Why?

For one, because it's great working for an organisation that really matters – and that plays such a critical role in society. I get a great feeling after a day's work that I've made an actual difference. After all, our job is to investigate complaints. And if something's gone wrong, it's *our job* to put things right. Last year we helped over a million people.

If you're someone who loves learning and developing – and enjoys change – this is a fast-moving and really positive place to be. We have a huge variety of work, covering every issue in financial services from spread-betting to mortgages. So there's an atmosphere of constant learning – and of debate and challenge. We're also constantly adapting to the changing needs of our customers. This means we're making ongoing improvements to how we do things here. Our heads of casework teams are critical to making this work. They lead teams of managers – ensuring our people are fully engaged in what we're doing and why we're doing it.

So what are we looking for in our heads of casework teams? The main thing is inspirational leadership. You'll lead a team of around eight team managers – who in turn manage teams of around 10 to 12 adjudicators (the people who investigate and resolve the majority of our cases). You'll need to spend a lot of your time developing your team managers – and providing them with the leadership, motivation and vision to help them deliver their targets.

You don't have *direct* line-management responsibility for the adjudicators – but you *are* fully responsible for *what* they do and *how* they interact with our customers and each other. You'll also need to be someone who builds strong relationships, both with senior colleagues across the organisation – to ensure we're sharing our knowledge internally – *and* with our external stakeholders to help them learn from the complaints we see.

Our heads of casework teams come from a wide range of backgrounds. Some have worked their way up from the role of adjudicator. Others have come from management roles in financial services or from other sectors. But there is one common factor in all those who succeed here. They're people who *really care* about what we do – and who take pride in ensuring that we deliver a really excellent service. Behind every "complaint" is a real person, and a real business. People's livelihoods can depend on our decisions. And sometimes the decisions we need to make aren't what people want to hear. So this isn't a job for everyone. It's for people who care about making a difference. I don't think there's much else that's quite as rewarding.

Natalie Ceeney CBE
chief ombudsman and chief executive

who we are

Our role is to resolve individual disputes between consumers and financial businesses – fairly, reasonably and impartially.

We were set up in 2000 as a statutory alternative to the courts. Over the last decade or so we have expanded significantly, and our remit now covers virtually all financial services and products – from pet insurance to spread-betting.

We employ over 1,500 people and have more than a million contacts with customers each year. We are, quite simply, the place consumers can come if they have a dispute with their financial service business that they can't sort out between themselves.

for more information

There is much more information about who we are and what we do on our award-winning website at www.financial-ombudsman.org.uk.

[Our plans for a changing world](#), which we published at the start of the financial year, highlights the challenges we have identified, the priorities we have agreed and the key measures we have set ourselves going forward. Our [annual review](#) gives an overview of the year with facts, figures and information about our workload and complaints trends.

For more information about the types of complaints we deal with, you might want to take a look at our regular newsletter, [ombudsman news](#), which includes case studies and case highlights.

our values

We believe we can best do what we're here for by knowing what matters to us – and standing by our values in all areas of our work. What matters to us is that:

- we do the right thing;
- we treat our customers well and respect their needs;
- we do what we say we'll do; *and*
- we're inquisitive and build everyone's knowledge.

diversity and fairness – at the heart of everything we do

We want to ensure we're reaching out to the widest range of people – both in the service we offer and in our recruitment. Our service is for everyone. We aim to be accessible – and to meet any particular needs our people or customers may have.

So please let us know if you'd like information in a different format or language – or if you'd like us to adapt how we deal or communicate with you.

head of casework teams

job title

head of casework teams

reports to

head of casework operations

location

London docklands

salary

starting salary

£60,000 *plus* excellent benefits and a non-contributory money-purchase pension.

aiming high

For really outstanding performance, and as your skills and knowledge develop, your salary as a head of casework teams could rise to £75,000.

purpose of the job

Our job here is to resolve disputes. Financial businesses are required by law to listen to their customers' complaints and try and sort them out. But if the consumer remains unhappy, they can come to us. This is when the consumer's "case" is referred to an adjudicator.

Your job is to lead a team of around eight team managers, each of whom themselves manages a team of around 10 to 12 adjudicators. You'll lead in a particular area of financial services (such as banking, insurance or payment protection insurance) – with support from expert ombudsmen and often with specialists in your teams. You'll have targets to achieve (we use a balanced scorecard) – not just in terms of number of cases and the timescale for resolving them, but also in terms of the quality of your teams' work. You'll also be responsible for how your teams are really living our values as an organisation.

Your role is to support and develop your team of managers, helping them grow the professional skills they need in the specific area they work in – as well as the leadership skills to handle the toughest situations. You'll also need to help your managers identify where they can improve – and provide coaching for them.

And you'll need to bring the team together, so that you get the best out of them as a group, using all of their skills –so that *together* you can deliver a truly excellent service.

about you

your experience

- We need you to have experience of operational and people leadership – and of dealing with teams of people – ideally gained in a “customer-facing” organisation.
- We also need you to have a track record of delivering excellent customer service – both yourself and through your staff.
- We must have confidence that you have the intellectual and “problem solving” skills to really get to the heart of the issues we deal with. Although you won’t be working on individual cases yourself, you need to have a rigorous understanding of what we do here – so that you know exactly what “good looks like”. This could be demonstrated through a strong academic background or through previous jobs which require problem-solving skills or policy work.
- We don’t necessarily require knowledge of any particular aspect of financial services to do this job – as you’ll be supported by experts in the area in question and given a lot of training. However, if you *do* know an area of financial services well, we’d welcome your expertise.

people leadership

- You’ll have experience of leading and motivating a team of managers. With the ability to inspire people. It’s important that your team has full confidence in you and want to follow you.
- We need you to have excellent coaching skills – which means being able to talk people through issues and help them improve – rather than just doing it for them. You’ll get the best out of your team if they feel engaged and want to develop. And of course, at times you’ll also need to have some tough conversations with people – that comes with being a good leader.
- We will want you to be someone who really engages your team in the future of the ombudsman service – helping them get excited both about their own career development and about opportunities for delivering an even better service. We’re constantly changing and evolving. And it’s *your* job to interpret what this really means for *everyone in your team*.

excellent communication skills

- You need to be someone with excellent listening skills – and someone who can ensure that our customers (businesses *and* consumers), as well as your team, feel they’ve really been “heard”. If a case is particularly challenging, or if a consumer complains about the level of service we have provided, it may be escalated up to *you* to investigate and resolve.
- Your communication skills, both written and oral, need to be very strong too – and you need to be someone who can adapt your style for your audience. You will also need to be able to engage with some of our key external stakeholders.
- You will also need to be great at engaging your whole team – holding team meetings, briefing your managers and adjudicators on what’s happening around them, getting them excited about delivering an even better service.

a strong team player who shares knowledge

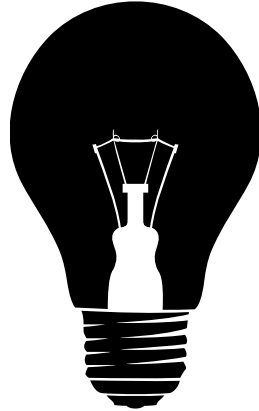
- We achieve things as a team and not by working alone. So you'll need to be someone who *asks* when you're not sure, who mucks in to help their colleagues if there's a lot on, and who wants to share knowledge and to learn.
- You'll need to be really good at building relationships around the organisation – so that you can solve issues with others, work out how you gain the knowledge and expertise you need for your team to succeed, and make sure that *together*, across the organisation, we get the best possible results.

strong intellectual, planning and problem solving skills

- You need to be able to get to the heart of issues quickly and capably. This means understanding our customers and what's important to them. It involves taking lots of different bits of information and working out “what really happened here?” You'll use these skills, in particular, when dealing with customer complaints.
- You also need to be able to organise and prioritise well – to achieve targets through others. You'll have lots of targets and objectives, and you'll need to work out how you're going to deliver them – deciding what you need to do when.
- we continuously seek to improve what we do and how we do it – therefore, you will need to be able to identify, lead and participate in projects and initiatives - not just in your own your product or service area, but also across the whole organisation.

delivering what we say we'll do

- You need to be someone who hits deadlines and who's organised. Someone who can work under pressure when there's a lot on. And someone who – when they say “*I'll phone you on Monday*” – makes sure they really *do* make that call on Monday!
- You also need to be able to hold your team to account – and to help them plan their work, so that they can meet their own deadlines. That means thinking about how to organise and motivate your team to achieve stretching goals.
- And finally, you need to be someone who *cares* about achieving results – and who's able to make sure your team delivers its targets.



illuminate

interested in what you've heard
about the job of head of casework teams ... ?

... here's how to apply

If you think you have the brightness, energy and proven experience in managing complex, high-powered operations – we want to hear from you!

To apply, please email us at ombudsman@agiletm.com, sending us:

- your CV;
- a short covering letter (no more than two sides please!), telling us why you're the right person to become one of our head of casework teams;
- details of your current remuneration and notice period;
- the names of two referees who we could contact if you're shortlisted (we'll only contact them after agreeing this with you – and we'll also want to contact your existing employer before we make a job offer).