



# Example of Lead Advisor Job Description

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Our company is growing rapidly and is looking for a lead advisor. Please review the list of responsibilities and qualifications. While this is our ideal list, we will consider candidates that do not necessarily have all of the qualifications, but have sufficient experience and talent.

## Responsibilities for lead advisor

- Demonstrate effective interpersonal skills to successfully promote good public relations and to communicate company policies, practices and procedures with tact and diplomacy
- Be familiar with all Gas and Electric Rates
- Conduct credit research
- Perform miscellaneous duties as required by supervision and management
- Utilizing daily reporting data to drive performance and ensure adherence to Student Outreach Guide
- Coaching advisors toward increased effectiveness, maintaining QA oversight of advisors within their teams to ensure the communication of accurate information and guidance to students, the utilization of advisor best practices
- Conducting weekly 1-on-1 meetings with academic advisors to review progress toward success and persistence goals, professional development and training opportunities, call observations for quality assurance, email review for quality assurance, projects or initiatives that the advisor is working on, student case studies/complex situations, progress toward advancement portfolio, and other miscellaneous topics
- Coaching advisors toward relationship building with students and the execution of our Service and Support Brand Values in every interaction with our students
- Leading by example to help advisors with complex student situations, engaging with students over the phone to problem solve and trouble-shoot

- Communicating changes in policy and procedure to the advising team, ensuring consistency in messaging, transparency, and context

## Qualifications for lead advisor

- Knowledge of Risk Technology Vendor Platforms (e.g OFSAA Reveleus, SAS Risk Solutions, AXIOM reporting, ) is a plus
- Have a degree level qualification or equivalent
- Have knowledge of the local, political, economic and business landscape in the Humber and wider North of England regions
- Have a strong local network with government and businesses in the Humber region
- Are a clear and concise communicator with strong presentation skills
- Are flexible and a self-starter