

## Insight and Outreach Manager

**Reports to:** Senior Insight and Outreach Manager

**Based:** Hybrid or Remote

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### Overview

The Compliance and Insight team is responsible for monitoring all aspects of registered firms' compliance with, and for supporting firms to embed through insight activity, the Standards and Codes for which the LSB is responsible. The team is critical to reporting on the positive impact of the LSB's Standards and Codes on customer outcomes and registered firms' achievement of those outcomes, and to supporting the industry to build capabilities across the sector to ensure all UK financial services firms can deliver better customer outcomes. In doing so, the team supports the LSB in achieving its vision that all customers receive the right outcome from their financial services provider, which lies at the heart of the LSB's role as a voluntary regulator and standards-setting body.

This team's functions are specifically aligned with the LSB's strategic aims of 'Independent assurance and oversight' and 'Industry insight and innovation' set out in its strategic plan 2024-27. Its work is driven by the dissemination of best practice and industry insights and the initial review of firms joining LSB registration.

Working with the Senior Insight and Outreach Manager, this role will play a pivotal part in ensuring that the LSB's insight and 'business development' activities achieve the deliverables set out in the LSB's business plan.

The Insight and Outreach Manager, under the direction of the Senior Insight and Outreach Manager, will be responsible for providing proactive, practical and pragmatic support to firms to assist them to meet the Standards of Lending Practice and other codes and voluntary standards through the delivery of roundtables, workshops, training, and to assist in the delivery of key projects, including: insight based qualitative and quantitative research and partnership work that supports the better treatment and outcomes for customers; and insight campaigns that focus on key themes across various mediums.

The role holder will also support the Senior Insight and Outreach Manager with the delivery of the LSB's business development activities, including the early engagement and monitoring of interactions with prospective firms, followed by due diligence and onboarding of new registrant firms.

## **The Role**

### **Insight**

- Support the delivery of the LSB's Insight strategy.
- Provide guidance to firms in relation to the interpretation and intended application of the Standards/Codes through:
  - drafting and delivering training material.
  - organising and leading on LSB roundtables following publication of Compliance summary reports and relevant Policy publications.
  - designing and delivering outcomes focused activity that can offer insights through written reports and other means where applicable.
  - attendance and contribution at LSB roundtables and forums and documenting key issues for distribution.
- Provide clear, evidence-based input to development of the Standards and the supporting information for practitioners.
- Support raising the profile of the LSB and our research outputs.

### **New firm registration oversight / business development**

- Engage with firms and other stakeholders to raise the profile and impact of the LSB through attendance at events and by representing the LSB at events, for example, speaking at industry roundtables and panels.
- Support the Senior Insight and Outreach Manager with the implementation of the LSB's annual target market and onboarding strategy.
- Actively support the delivery and monitoring of individual development plans for target firms.
- Co-ordinate early engagement meetings with firms to share the impact of registration and the value proposition with firms considering registration or who are part of the registration target plan.
- Conduct due diligence of new registrant firms.
- Support the identification and delivery of strategies underpinning firm retention and increasing the market coverage of the LSB's Standards and Codes.

The role will require travel throughout the UK to visit interim registered and registered firms, attend events and deliver insight activity, and may require occasional overnight stays.

## **Knowledge, skills, and experience**

### **Essential**

- A compliance, risk or audit background in the UK retail and/or SME financial services industry with a good understanding of the credit regulatory landscape.
- Experience in an assurance or oversight role.
- Confident and experienced networker, building relationships and alliances.

### **Internal**

- First class presentation skills (oral and written).
- Experience of creating and delivering engaging and impactful training.
- Ability to link 'regulatory language' with operational delivery in an engaging and clear way.
- Strong interpersonal skills with experience of engaging with senior personnel and gaining acceptance of report findings and delivery of best practice.
- Good planning skills with attention to detail and capable of seeing the 'bigger picture'.
- Logical, independent thinker with the ability to influence others through tactful and sound persuasion.
- Ability to deal constructively with resistance and support the identification of pragmatic solutions.
- Ability to undertake analysis across a range of monitoring activities.
- Ability to form judgments quickly based upon the balance of information gathered.
- Confident using MS Word, Excel, PowerPoint and Outlook.
- A team player willing to contribute enthusiasm, ideas and suggestions.

### **Desirable**

- Data analysis experience
- A belief in consumer and business protection and raising financial services industry standards.

### **The individual**

- Enthusiasm for consumer and business customer protection and raising financial services industry standards.
- A champion of the LSB values - *integrity, impact, inquiring and inclusive*.
- Readily demonstrates the LSB behaviours - *professional; honest; responsible & accountable; self-managing; focussed; objective; logical; agile; learning; improving; developing; open; collaborative; supportive; and aware*.

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