

**Date**

1 Sept 2025

**Topic**

Retail Client Service Team Lead

We are looking for an exceptional individual to join our Retail Client Service Centre as a Team Leader. In this role you will be instrumental in our pursuit of servicing excellence, ensuring seamless daily management of our environment and driving the highest level of service delivery. Are you ready to take charge, inspire a team, and make a lasting impact?

**Duties And Daily Responsibilities:**

- Working in a LISP and institutional/corporate environment.
  - Daily management of all operational aspects of the environment
  - Ongoing support, mentoring and coaching of existing and new Client Relationship Managers (CRMs)
  - Monthly evaluation of CRM calls and emails against Sygnia servicing standards
  - Daily monitoring of and addressing client survey results, with aligned CRM coaching and development plans
  - Identify and address all CRM training needs as well as the implementation of monthly knowledge assessments
  - Design and implementation of work methods that will ensure the continuous enhancement of service delivery
  - Monitoring and measurement of client satisfaction
  - Facilitate process and system enhancements
  - Team resource planning
  - Facilitate and guide personal growth and development of CRMs
  - Monitoring and management of team performance and quality metrics
  - Analysis of servicing related errors and revision of risk controls
  - Fostering and maintaining a positive team culture
  - Ensure workloads are managed and cleared in accordance with SLA
  - Team performance appraisals
  - Assisting with recruitment, candidate selection and building a strong pipeline of CRMs
  - Dealing with elevated client queries and escalations
  - Daily stats and environment reporting
  - Engagement with service providers to enhance CRM systems and resolve any malfunction
  - Engage with all Retail Teams to promote and encourage further progression of Retail culture
  - Collaborate with Retail Team Leaders to propel an efficient Retail operation
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- Ensure regulatory, client, and other corporate records are maintained.
- Ensure timely completion of all risk and compliance training.

**Role Qualifications and Experience:**

- BCom or equivalent undergraduate degree / diploma is preferable
- 3-5 years' experience in Client Servicing coupled with a minimum of 12 months leadership experience
- Experience in the Linked Investment Service Provider (LISP) environment administration is preferable
- Experience in the following Financial Services industries is an advantage:
  - LISP
  - Collective Investment Schemes
  - Retirement Funds
  - Linked Life Companies
  - Exchange Traded Funds (ETFs)
- Advanced Excel skills
- Ability to lead, motivate, develop, and inspire people
- Exceptional interpersonal skills
- Excellent verbal and written communication skills
- A strategic client-focused mindset
- Ability to build sustainable business relationships
- Strong organizational skills – a passion for getting things done quickly and correctly
- Innovative with strong problem-solving capability
- Self-motivated and proactive
- Resilient
- A distinct passion for helping and progressing people
- Ability to manage multiple projects while prioritizing work assignments
- Strong attention to detail

To apply:

Email CV to: [recruit@sygnia.co.za](mailto:recruit@sygnia.co.za)

Closing date: 1 September 2025

For more information:

Contact: Sesethu Gobelo

mail: [recruit@sygnia.co.za](mailto:recruit@sygnia.co.za)

Should you not hear from us within 14 days after submitting your application, please accept your application as unsuccessful.

*Disclaimer: please be advised that your personal information shared on your CV will only be used as part of the Sygnia recruitment process for the role applied for. It will not be shared with any third parties for any other reason.*