

JOB DESCRIPTION

| Job Title: Customer Service Advisor | Date: March 2016 |
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| Location: Customer Service Team | |
| Reporting to: Customer Service Team Manager | |
| Functional responsibility to: The whole Company | |
| Regular relationships: Customer Service Team Manager Customer Service Supervisor Customer Service Advisors | |
| Immediate subordinates: None | |
| Key Tasks & Activity | Standards of Performance |
| <p>1. <u>Incoming telephone calls</u></p> <ul style="list-style-type: none"> • Dealing with all enquiries from estate agents, clients, solicitors, etc. • Deal with queries or, if not possible, transferring calls to the relevant member of staff. • Recording all incoming communications onto the case management system and alerting the case handler to any messages by email. | <ul style="list-style-type: none"> • Ensuring that calls are answered within a reasonable time as agreed with the Customer Service Team Manager. • Answering an acceptable percentage of the incoming calls as agreed with the Customer Service Team Manager. • Record all information accurately and comprehensively enough to be understood by colleagues. • Calls to be dealt with using all agreed protocols, ensuring a professional manner is maintained at all times. |
| <p>2. <u>Outgoing telephone calls</u></p> <ul style="list-style-type: none"> • Making calls as required to obtain information or provide information to any party involved in the conveyancing process. | <ul style="list-style-type: none"> • Calls to be dealt with using all agreed protocols, ensuring a professional manner is maintained at all times. |
| <p>3. <u>Giving Quotes</u></p> <ul style="list-style-type: none"> • Quote requests will be received by phone, emails or post. • Quotes must be given in a timely manner and by the method requested, either phone, email or post, using the correct fee scale. • All quotes must be entered into the case management system. • Follow up contact should be made in order to convert the opportunity into an instruction. | <ul style="list-style-type: none"> • Quotes to be processed in a timely manner. This may be the same day or immediately if necessary. • Accuracy in obtaining the information needed to be able to quote the correct fees, referencing the various fee scales in operation. • Follow up contact must be made, as agreed, in order to convert as many opportunities into instructions as possible. |
| <p>4. <u>Instruction processing/file admin</u></p> <ul style="list-style-type: none"> • Processing new instructions and sending initial documentation to relevant parties. • Amending and editing information on existing files when necessary. | <ul style="list-style-type: none"> • Enter all information accurately to ensure that the system and subsequent documentation sent to the client is correct. • Process an acceptable number of instructions daily, |

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| | as agreed with the Customer Service Team Manager. |
| <p>5. <u>General admin duties</u></p> <ul style="list-style-type: none"> • The Customer Service Department's main objective is to support the rest of the Company and provide good customer service. • This may require further administrative duties from time to time that do not fall within the normal day-to-day role of the team. | <ul style="list-style-type: none"> • All tasks undertaken must be done accurately and efficiently and to the individual requirements of that particular task. |
| <p>6. <u>Projects</u></p> <ul style="list-style-type: none"> • The Customer Service Team often provides support for new projects and pilots. Members of the team will be expected to participate in new tasks as required by the business. | <ul style="list-style-type: none"> • To be undertaken in a proactive manner and completed to the standards required for each individual task. |
| <p>7. <u>Team Meetings</u></p> <ul style="list-style-type: none"> • Meetings will be held to discuss performance, new initiatives and any areas of concern. | <ul style="list-style-type: none"> • Employees are expected to take an active part in meetings and give feedback as required. |
| <p>8. <u>Performance Reviews</u></p> <ul style="list-style-type: none"> • Attending regular appraisals to include: <ul style="list-style-type: none"> ○ annual performance review ○ monthly one-to-ones to discuss your performance and development. | As required |
| <p>9. <u>Management Requests</u></p> <ul style="list-style-type: none"> • Assist other departments as required by the Management Team. | As required |
| <p>10. <u>Any other task required</u></p> <ul style="list-style-type: none"> • Any other task done correctly and timely using the correct procedure at all times. | As required |
| <p>11. <u>Other</u></p> <ul style="list-style-type: none"> • Other duties and responsibilities as the role develops and the Company grows. | |
| <p>Resources available</p> <ul style="list-style-type: none"> • Desktop computer with Microsoft Office Package • Various digital printers and scanners • Telephone system with headsets if appropriate • Use of e-mail and access to the internet for work purposes only • Company Intranet and Public Folders | |
| <p>Qualifications required</p> <ul style="list-style-type: none"> • GCSE, or equivalent in Maths and English with a minimum grade C. • A levels, or equivalent, in Maths and English with a minimum grade C. | |

Skills Required

- Relevant experience would be an advantage
- Excellent communication skills, well-spoken and personable; able to get on with diverse personalities
- Friendly and approachable
- Reliable and consistent
- Helpful and positive attitude
- Flexible attitude to working practices and demands
- Responsible, professional and trustworthy
- Good time management and organisational skills
- Good literacy and computer skills, especially Word and Excel.
- Strong organisation, planning, problem-solving and multi-tasking skills
- Confident, resourceful and practical
- Self-motivated with the ability to work alone or within a team
- Personal commitment to equality and diversity

Training

All staff are encouraged to further their personal training and development. The Company has a Learning & Development Department providing a wide range of in-house learning opportunities, including one-to-one job skills. External training is supported by the Company by prior agreement and where appropriate.

Conditions:

Working hours: Dependent on the job role and will be advised at job offer stage

Holiday: 20 days holiday plus Bank Holidays

Additional holiday days accrued at 1 day for every year's service in the annual leave year following completion of the 1 years' service increasing annually thereafter by one day up to a maximum of 5 additional days. Holiday year runs from 1st January to 31st December.

Any holiday entitlement will be pro-rata for part-time employees.

Pension: Enrolment into Company Workplace Pension Scheme 3 months after joining. Company stakeholder pension scheme is also available.

Terms: Company Terms and Conditions of Employment and policies and procedures provide further details.

Note: If you are a current employee transferring to a new position/department please see your letter of confirmation for changes in terms and conditions, if any.