



Role Profile

Role Title: Customer Services Associate

Department: Customer Services

Reports To: Customer Services Team Leader

Purpose of Role: To effectively manage all Customer Services activity in line with company policies and procedures. As part of a growing department, the successful applicant will engage with customers across the full range of mortgage servicing activities and become expert in key workflows within a specialist team.

Key Accountabilities:

- Manage the flow of incoming and outgoing calls whilst working to daily targets (team and individual)
- Effectively manage inbound and outbound post
- Ensure all communications are in line with company policies, standards and procedures
- Administer correspondence from borrowers and take the relevant action within agreed time-scales.
- Accurately updating borrower's account on internal systems after each and every call.
- Ad hoc requirements as requested by Manager or Team Leader
- To Treat Customers Fairly at all times
- Ensure that all mandatory training is completed
- Ensure compliance with the FCA Mortgage Codes of Business, Data Protection and Anti Money Laundering Legislation.
- Adhering to company policies, standards and procedures
- Proactively manage own personal development

Essential Skills/Qualifications:

- Clear and confident Telephone manner with the ability to effectively communicate with our customers
- Proven Customer Services telephonic experience, ideally with a Financial Services/Mortgage company
- Good mathematical skills to a minimum GCSE level
- Flexible intuitive approach both to Customer Service and working with the team
- Organised and efficient way of working to be able to manage priorities
- Excellent time management skills and to be able to manage and make effective decisions as and when required
- Display and prove behaviours consistent with regulation and compliance with the principles of the Fair Treatment of Customers.
- An understanding of FCA regulations essential
- Be able to successfully pass a reference and credit check
- PC literate
- Experience of the Financial Services industry and supporting regulations including Consumer Duty (CD), Treating Customers Fairly (TCF) and Environmental Social and Governance (ESG) is preferred however training will be given where required.



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Our people embrace our values:

Fair - We are open minded and make unbiased, consistent decisions.

Accountable - We take ownership of situations so that our customers experience efficiency.

Customer first - We understand what our customers want and build strong relationships.

Transparent - We communicate clearly and concisely, ensuring that we are open with information.

This role involves regulated activity and the job-holder will be trained accordingly



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