



Role Profile

Role Title: Telephone Case Manager (TCM)
Department: Broker Services (Operations)
Reports To: Telephone Case Manager Team Leader & Lending Services Manager

Purpose of Role: To provide an excellent and proactive service to brokers in helping them progress their applications to completion. A strong and clear communicator, delivering professional levels of service to all parties involved in mortgage origination process by always putting the customer and broker first and being accountable. Quality, accuracy and high levels of both inbound and outbound activity are essential to achieve Company objectives for growth whilst maintaining the Foundation brand.

Key Accountabilities:

- Developing and maintaining key relationships with internal and external customers
- Expert in use of Lender Portal and CRM, understanding all New Business processes in order to relay comprehensive and accurate updates to brokers
- Maintain accurate records of all interactions with brokers
- Adhere to all processes and policies, ensuring that excellent quality assurance results are consistently achieved
- Plan and organise own workload to ensure personal and team objectives and deadlines are met
- Take responsibility for personal development, identifying and pursuing opportunities where appropriate to maintain and develop expertise
- Meet key performance indicators and service levels by working to agreed objectives and deliverables
- Proactive and positive communicator, who is naturally organised, enjoys achieving stretching targets
- Maintain up to date awareness of current market, financial and regulatory requirements
- Shows ambition and takes ownership for personal development and learning
- Telephone call handing, including Business to Business with intermediaries and Solicitors
- Carry out any tasks or activities required by Manager



Tel: 0344 770 8030
www.foundationlending.co.uk

FOUNDATION
3 Arlington Square
Downshire Way
Bracknell, Berkshire
RG12 1WA

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- Work closely with the Underwriters to ensure applications are progressed to outcome efficiently and accurately

Essential Skills/Qualifications:

- Excellent communication & relationship management skills
- Self-motivated and enthusiastic with drive to succeed and deliver results
- Excellent telephone manner
- Knowledge of key elements of mortgage applications through to completions
- Previous experience within mortgages desirable and within wider financial services essential
- Adaptable and flexible to enable department to deliver exceptional customer service
- Approachable, with a sense of humour, able to remain calm when working under pressure
- Dynamic and enthusiastic, with a strong desire to achieve
- Strong organisation skills with an ability to work to strict deadlines whilst maintaining a good level of productivity
- Has the ability to adapt quickly and effectively to change
- Good Team player
- PC literate with knowledge of Microsoft office products and outlook
- Pro-active and alert to making suggestions for process and system improvements
- 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.

OUR VISION: **TO BE THE MOST TRUSTED LENDER**

OUR VALUES



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