

## JOB DESCRIPTION

<b>JOB TITLE</b>	Case Manager
<b>REPORTS TO</b>	Head of Case Management

### PURPOSE

To provide support to the sales team, managing case files accurately within prescribed timescales, and focusing on achieving excellent customer service at all times. To ensure that support is provided to other case managers in order that Company objectives can be met.

### KEY RESPONSIBILITIES

#### People Related Tasks

- Build and maintain effective relationships with all new and existing clients
- Act as the first 'port of call' for clients, lenders and conveyancers with any queries on a particular mortgage case (at all stages of the process from successful DIP through to legal completion and beyond)
- Ensure timely, accurate and appropriate responses to telephone calls/enquiries or correspondence from clients, lenders or conveyancers
- Liaise with mortgage consultants, appraising them of the progress of specific mortgage cases and seeking to resolve any queries arising
- Liaise with the line manager, escalating any specific problems for discussion and resolution

#### Daily Operations

- Works within prescribed procedures and practices
- Inputs, updates and maintains data so that systems and files accurately reflect current position at all times
- Produces written correspondence and documents using standard formats
- Manages diary system to monitor cases and progress chase as appropriate
- Follow case progress through the complete process to legal completion and beyond

### KEY SKILLS / COMPETENCIES

#### Adaptability & Flexibility

- Coping with changing circumstances and acting in a manner that facilitates the change process
- Redirects efforts proactively applying an understanding of the reasons to support colleagues
- Recognises the need for change and makes recommendations accordingly

#### Co-operation and Teamwork

- Participates as a team member, creating effective and professional working relationships with colleagues
- Co-operates openly and honestly with colleagues and participates in team activities, sharing experiences and ideas
- Assists other team members when necessary

**Monitoring and Controlling Progress**

- Actively monitors progress of day to day work and takes action to achieve targets
- Provides feedback to line manager of any potential problems

**Knowledge of Process**

- Full understanding of required processes and prescribed practices
- Interprets procedures to ensure excellent customer service
- Makes suggestions for process improvements

**Communication**

- Communicating facts and concepts so they can be easily interpreted and understood by others
- Balances amount and level of information, conveys key issues in appropriate order to give an overall picture
- Communicates in plain English, speaking clearly and fluently and using correct grammar in all written work
- Listens to instructions and passes on information as directed

**Planning Own Work**

- Establish a course of action for self to accomplish day to day work targets
- Is aware of team's priorities, targets and objectives and plans own work accordingly

**Customer Service**

- Does more than requested – follows up to make sure needs have been met; shows pro-activity in offering assistance without being asked.
- Interprets customer requirements and produces solutions taking into account of business requirements
- Continually looks for ways to exceed customer standards
- Displays customer service skills in a positive and customer friendly manner