



A S Recruiting
Your future is our future

A S Recruiting Ltd
Fernleigh Bray Shop Callington Cornwall PL17 8PZ
Tel — 01579 370 488
Mobile — 07747 022 148
Email — info@asrecruiting.co.uk

Job Description

Title	Client Relationship Officer: Sales & Customer Service
Base	Cornwall - Launceston
Reporting To	Sales and Customer Services Manager
Salary	Up to £25,000 (depending on experience)
Hours	Monday to Friday 37.5 hours per week

Responsibilities

To focus on outbound and inbound customer calls and aim to convert all leads to applications. Support the Sales and Customer Service team with any customer focused tasks relating to applications

Key Accountabilities for Loan Processing

Contact customer leads via phone and explain our products with the aim of converting leads to applications.
Assist in researching potential lenders and borrowers and contact the leads.
Handle inbound and outbound sales enquiries: post, email, telephone and shared email boxes. Convert lender and borrower inbound leads to applications via phone or face to face appointments.
Action any direct borrower leads which meet our basic criteria from application to submission.
Prepare and write loan applications ensuring that all relevant information is collated and recorded accurately and within the recommended timescale
Liaise with Business Development Managers to ensure necessary details are collected to enable an accurate and detailed application can be prepared.
Liaise with The Head of Farming and Rural Engagement and Corporate and Community Services Manager and follow up any leads as required.
Follow up any lender leads from Crediton office.
Process any broker applications through to submission.



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Accurate recording of client data on CRM system, Lender Lead, Waiting List and other internal business systems. Utilise these systems for all borrower and lender leads.

Conduct face to face meetings with clients to ensure that relevant documentation relating to loans such as personal ID is collected, copied and returned to the client. Prepare comprehensive fact finding to support applications.

To act as the first point of contact for any client queries relating to enquiries and loan applications and keep the client updated on the status of the application prior to submitting for processing to Head Office.

Forward completed loan applications to the loan processing team at Head Office. Ensure that loan applications are submitted within the agreed timescales and meet the credit criteria stipulated by the business.

Deal with any queries raised by the loan processing team relating to applications. Provide the Business Development Managers with administrative support.

ISA on boarding

Respond to any inbound client queries: post, email, telephone and shared email boxes.

Ensure that all customer details and anti-money laundering checks are kept up to date and reviewed as needed.

Keep the Sales and Customer Services Manager up to date with applications/leads etc

Ensure that FCA compliance and other financial regulations are adhered to.

Make sure that any sensitive data is collected and recorded according to GDPR.

Miscellaneous: Any other duties as required.

Knowledge and skills:

Experience in sales or customer service role

Microsoft office skills: Word, Excel and PowerPoint

Sound credit knowledge

Customer facing experience.

Excellent written and verbal communication.

Understanding of the business model/ethos

Commercial/financial awareness

Key Competencies:

Customer Focus

Taking responsibility/Leadership

Teamwork/Collaboration

Expertise

We are an equal opportunities employer and positively encourage applications from suitably qualified candidates regardless of gender, race, age, disability.

Please contact Angela Stuart on 01579 370488 or Mobile 07747 022148. Email your cv and details to angela@asrecruiting.co.uk

Ref AS/FF5



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