



Job Description

Title	Client Relationship Officer – Direct & Introducer of Sales and Customer Service
Short description	Customer Service
Company	Business 2 Business
Base	Based at Launceston
Reporting To	Customer Service and Sales Manager
Salary	£ Negotiable - depending on experience

Job purpose

Customer Service and Sales Support

Key tasks

Sales and Customer Service:

- Handle inbound and outbound sales/service enquiries: post, email, telephone and shared email boxes.
- Convert lender and borrower leads to applications via phone or face to face appointments.
- Take a proactive role in building relationships and business with potential and existing borrowers and lenders at events in the region and at Head office.
- Lender and ISA on boarding
- Liaise with Business Development Managers to ensure necessary details are collected to enable an accurate and detailed application can be prepared and provide the Business Development Managers with administrative support.
- Prepare and write loan applications ensuring that all relevant information is collated and recorded accurately and within the recommended timescale.
- 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.

Introducers: Work closely with the Broker Business Development Manager to Research Brokers and other professional partners to identify new leads and potential markets; and provide the Broker Business Development Manager with administrative support. Proactively develop relationships with Brokers and other professional partners to generate Sales opportunities through outbound calling.

Administration: Accurate recording of client and contact data on CRM system, Lender Lead, Waiting List, Contacts systems. Utilise these systems for all borrower and lender leads.

Where required, on-board professional partners through the application process. Ensure that all customer details and anti-money laundering checks are kept up to date and reviewed as needed.

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

Knowledge and skills:

Microsoft office skills: Word, Excel and PowerPoint

Sound credit knowledge

Customer facing experience.

Excellent written and verbal communication.

Understanding of Financial Services business model/ethos

Commercial/financial awareness

Key competencies:

Customer Focus

Teamwork/Collaboration

Responsibility and leadership

Expertise

Salary and Working hours

- Competitive salary and benefits.
- Paid Annual Leave 20 working days pro-rata part time hours.
- HOURS –37.50 minimum
- Office Parking, new offices, contemporary soft and hardware.

Training



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A S Recruiting Ltd
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Tel — 01579 370 488
Mobile — 07747 022 148
Email — info@asrecruiting.co.uk

Full training is given by the company, for certain tasks. Current post holder will be in place to train a new recruit.

How to apply?

For an application form and job description please contact **Angela Stuart** at **A S Recruiting Ltd** via email angela@asrecruiting.co.uk or Telephone on **01579 370488** or **07747 022148**.

Please quote Job Reference Number **AS/3087**

Closing date for application

30th June 2019

Interviews with the agency will follow, and an interview with client to accommodate current applicants working hours where possible.



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