|  |  |
| --- | --- |
| **Job Family** | **ISS** |
| **Role Title:** | ISS Assistant |
| **Banding** | 4b |
| **Summary:** | Identifying opportunities that help intermediaries write business with the Society by providing information and support by way of product knowledge, underwriting guidance, mortgage illustrations and excellent customer service. Quickly responding to, and accurately processing, mortgage Decisions In Principle (DIPs), ESIS requests, as well as handling inbound broker telephone and email enquiries within agree service levels.Attending occasional workshops and seminars with Intermediary Sales Team colleagues and preparing literature in order to educate mortgage intermediaries on our products and services. Adhere to the broker due diligence process to ensure that registered intermediaries are compliant with internal and external policies and procedures. Help to identify risks whilst adopting and conveying a fair culture for the benefit of customers and brokers by providing accurate, compliant information and guidance. |
| **Purpose:** | To help the Society achieve its intermediary mortgage lending targets, across the mortgage product range by providing administrative and sales support to mortgage intermediaries. |

|  |  |  |
| --- | --- | --- |
| **What I Do:**  | **How I Work:** | **What I Can Do:** |
| * Provide exceptional customer support to clients, helping to exceed client expectation.
* Process DIPs and ESIS requests received from intermediaries within agreed SLAs.
* Handling mortgage, lending criteria and process queries from intermediaries, by both telephone and email, within SLA to proactively encourage increased levels of business.
* Proactively make outbound telephone calls to identified intermediaries to chase DIPs and other sales opportunities. Proactively and reactively seek feedback on the Society’s products and services, and feed this into line management for discussion and consideration at Product Committee and other Society forums.
* Accurately and timely recording of all call and email activity in both Team and Society systems.
* Register new brokers, proactively contacting them with relevant information for writing future business with the Society.
* Complying with the broker due diligence procedure for registering and monitoring broker activity including verification of new and existing intermediaries.
* Contacting new brokers and first time introducers to make them aware of Society products, contact points, lending criteria and processes.
* Build and maintain relationships with intermediaries, and with colleagues, in particular those in Mortgage Department.
* Liaising with intermediaries in a professional manner, keeping them up to date with their cases and resolving issues where required.
* Highlighting potential sales opportunities, resolving or escalating issues and liaising with internal departments as appropriate to meet the needs of brokers.
* Adhering to the Financial Conduct Authority’s Principles and Rules, including Treating Customers Fairly, Conduct Risk and the Society’s risk management policies and procedures.
* Assisting with business marketing promotions, structured mailshots or telephone campaigns, broker satisfaction surveys and other ad-hoc activities as required.
* Keeping up to date with and adhering to Society procedures and policies.
* Attending occasional workshops and seminars with Intermediary Sales Team colleagues and preparing literature in order to educate mortgage intermediaries on our products and services.
* Assisting brokers and customers in selecting appropriate retention products.
 | **Customer Focus:**A genuine passion for wanting to help our customers and creating great connections and experiences. **Exceptional Communication:**A natural ability to connect to people through clear, friendly and empathic communications.**Skills and Attributes:** * Be organised
* Have an ability to work to deadlines
* Give good attention to detail
* Team player
 | * 5 GCSES/O’LEVELS A-C
* 1 Years’ experience within a similar position.
* At least 1 years’ experience in a customer facing position.
* Experience of working in a regulated environment (desirable)
* CeMap level 3 qualification (desirable)
* Knowledge of regulation, AML and treating customers fairly (desirable)
* Mortgage knowledge (desirable)
 |

