



Role Profile

Role Title: Business Processing and Broker Desk Consultant

Department: New Business

Reports To: Broker Desk Team Leader

Purpose of Role:

To be the conduit between our distribution, sales and the new business processing team to ensure optimum service standards are efficiently delivered. To proactively chase outstanding documentation and applications, and effectively communicate our product proposition and manage communications of new products, product withdrawals, services and other key information to our distribution. To deliver exceptional, professional levels of customer service to all parties involved in mortgage origination and processing of new business from initial enquiry through to funds release and completion of the loans.

Key Accountabilities

- Demonstrate an in-depth knowledge of our product offering and lending policy
- Take ownership of inbound calls and always seek to find solutions to broker queries
- Able to multitask, including (but not limited to) data entry, preparation of mortgage related documents, dealing with refund requests, indexing of documents, scanning and assigning post, chasing brokers on cases in the pipeline, dealing with inbound calls.
- Proactively manage the department mailboxes and all tasks assigned to you from the daily rota
- Proactive external/internal chasing for outstanding case information to enable cases to progress to offer/completion
- Develop a complete understanding of the broker portal and provide 1st line support to our distribution within required SLA's
- 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 skill.
- Contribute towards functional strategy development, planning and implementation process
- Provide testing support when new functionality/systems/processes are introduced
- Feedback key market intelligence and recommend areas for improvement, where appropriate
Establish an excellent working relationship with Regional Account Managers, Internal BDM's and the New Business Team
- Any tasks or activities required by Management

Performance Behaviours: Gets Results/ Organisation & Planning/ Ownership/ Focuses on the Customer/ Can Do Approach/ Values People

Essential Skills/Qualifications:

- Quality and accuracy
- Excellent communication & relationship management skills
- Attention to detail
- Ability to multi task to ensure SLA's are met
- Proactive team player



- Strong MS Office skills, including Outlook, Word, Excel
- Confident and professional in delivering decisions to distribution
- Strong personality but able to show diplomacy and empathy where necessary
- Self-motivated and enthusiastic with drive to succeed and deliver results
- Time management skills
- Experience of working within Financial Services environment ideally Mortgage related
- Strong understanding of regulatory landscape, Data Protection (GDPR), Anti Money Laundering, TCF, MCOB, Fraud aware
- Adaptable and flexible to change to enable department to deliver exceptional customer service
- Approachable, able to remain calm when working under pressure

Desirable Skills/Qualifications:

- Mortgage Originations experience
- Telephone based experience

This role could potentially involve a regulated activity and the job-holder will be informed and trained accordingly