


Job Description		
Job Title	Client Services Advisor	
Reports to	Client Services manager	
Direct Reportees	N/A	

Summary of Position

As a key contributor to the success of our business, the Client Services Advisor is responsible for being the first point of contact for our clients. The role involves completing all required due diligence, providing accurate conveyancing quotations, and converting enquiries into live files.

Core Duties

- Adhere to the ASAP workflow processes
- Maintain high standards of accuracy and professionalism at all times
- Ensure all tasks are managed within agreed Service Levels and timescales
- Conducting compliance packs and anti-money laundering checks on behalf of our agents where required
- Onboarding new buyers/sellers through warm leads
- Effective development of relationships with all relevant parties in the transaction
- Opening any new cases as required
- Providing guidance to sellers and buyers on the conveyancing process
- Delivering excellent customer service
- Being an advocate of the company at all times.
- Understanding & adhering to the internal escalation process.

Behaviours

- Confident.
- Self-motivated and ability to use initiative.
- Professional, clear and succinct communication skills and telephone manner.
- Proactive.
- Exceptional attention to detail in all tasks.
- Strong customer service focus.
- A positive can-do attitude.
- Experience working within a professional, office environment.
- Computer literate.
- Ability to multi-task and prioritise.
- Team Player.

Core Accountabilities

To ensure that all core duties detailed above are delivered successfully.
Responsible for the Health and Safety of your team, yourself and those around you. You will ensure all H&S policies and practices are adhered to and escalated in the correct way.
You are required to act in a way that does not subject any other employees, potential employees,

workers or clients to direct or indirect discrimination, harassment or victimisation.
Ensure that GDPR and Confidentiality practices are observed at all times.

Competences

Core Competencies

Professionalism
Communication
Attention to Detail
Customer Service
Team Working
Empathetic
Self-Motivated
Maintains Standards
Time Management

Role Specific Competencies

Adaptability
Accurate record production
Ability to multi-task
Diary and task management
Confident telephone manner
Build and maintain positive relationships
Estate agency experience
Conflict handling

Desirable Knowledge, Experience and Capabilities

Conveyancing industry knowledge
Sales experience
Experience working within a professional, office environment
A good understanding of the home moving process

Skills and Qualifications

Essential
IT literate

Desirable / Working Towards

Experience within a hybrid working environment

Career Path*

CPD

Customer Service training
Sales training

Progression

Sales Progressor
Sales progression support
Management

*based on development criteria

Working Relationships

This role will have working relationships with: All Sales Progressor colleagues.
Interdepartmental working relationships will include: Client Services colleagues.
External working relationships include: solicitors, estate agents, sellers & buyers.