

# Role Manifesto

## Customer Account Manager



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### Key Details

Monday – Friday, 09:00- 17:30

Working Hours: 37.5 hour working week

Salary: To be discussed plus discretionary annual bonus.

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### Benefits

24 holidays, plus bank holidays, (Increases to 25 after 1 year's service)

Close proximity to Wilmslow train station

24-hour colleague assistance helpline

Westfield Health cash plan

Team social events and trips

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### What We Do

We offer bridging finance on residential, semi-commercial, and commercial properties. As a business we look at every case on its own merits, and work closely with our clients to ensure their financial needs are met. We are fast, flexible and reliable in our offering.

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### Our Vision

We are growing into a nationwide bridging finance business, with the aim of having a £250m loan book, lending on average £25m per month, via brokers and directly to investors and property companies, for residential and commercial property transactions across the UK. We believe that a total commitment to people, values and relationships will disrupt our industry.

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### Role Overview

The core mission of this role is to support customers through the lifecycle of their loan with us. You will relentlessly deliver a positive experience for our customers even when they are experiencing difficulties. You take pride in delivering the best possible outcomes for every loan, whether it is a straight forward redemption or minimising our losses on a problem loan.

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### Obsess & Excel

To be really successful in this role there are certain areas the right candidate needs to obsess over or excel at:

- Plot your way to a prompt resolution no matter how complicated or difficult the situation
  - Commerciality – know what’s best for the business (and is acceptable to the customer)
  - Establish rapport quickly
  - Curiosity to ask questions and listen to the answers
  - Care about our customers – have empathy, but not sympathy
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### Outcomes in Your Role

#### Within 3 Months:

- Complete your induction and demonstrate an understanding of what we do and how we do it
- Introduce yourself to every customer in your portfolio
- Categorise every account according to our contact strategy
- Check-in with your Team Leader on Core Behaviours
- Establish rapport with our 3<sup>rd</sup> party suppliers

#### Within 12 Months:

- Be able to manage accounts in arrears through to receivership
  - Proactively recommend courses of action that are routinely approved by your Team Leader
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### Essential Qualifications/Previous Experience

- Property experience helpful
- Collections experience not essential
- Must be IT proficient
- English and Maths to GCSE level

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MS LENDING GROUP

