



## **CLIENT SERVICES EXECUTIVE**

### **KEY DUTIES AND RESPONSIBILITIES**

#### **A. Client Services**

The postholder is responsible for providing efficient client services procedures and ensures that all client communication is executed with the utmost accuracy and efficiency, in particular:

##### **Enquiry Handling:**

- Answering telephone and email enquiries from potential clients, entering them on to the central database and referring to the appropriate regional associate ensuring that they are followed up
- Tracking and reporting on all referred leads, providing monthly referral reports to the management team

##### **Administration:**

- Performing credit checks online for new clients, collating contracts, documentation, acknowledging fee receipts, invoicing; setting up client folders and updating the central database
- Generating all client correspondence administered in line with Garrington client services procedure
- Ensuring any client issues are logged and addressed within the procedural time frames and a suitable conclusion is met and recorded
- Liaising with regional associates and managers on client issues
- Maintaining client confidentiality at all times
- Proof-reading, printing and collation of property reports

##### **Completion Services:**

- To assist clients purchasing residential properties with post-completion services when requested, e.g. removals, cleaning services and utility transfer. Liaising closely with the regional associate post-exchange and pre-completion to ensure that the services are in place with referral suppliers.

Garrington  
1 Stow Court  
Stow Road  
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CB25 9AS

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### **Reporting:**

- Tracking and updating weekly regional client pipelines on central database and spreadsheet
- Generating fortnightly referral reports from database to associates
- Regular communication and co-ordination with the Garrington national network of associates

### **B: General business administration:**

- Updating financial spreadsheets and filing invoices raised and to be paid
- Updating Garrington terms of business for all associated services
- Drawing up associate referral agreements and relevant correspondence and ensuring that all documentation is returned and reviewed at required times
- Assisting with organisation of quarterly Team Meetings in London, preparing associated paperwork and taking notes of the meeting
- Monitoring and ordering stationery and office supplies
- Postal services
- Assisting the Operations Manager with any other *ad-hoc* administrative tasks as and when required

The job holder, whilst working relatively independently on a day-to-day basis, will operate as a member of an expanding team and will be expected to liaise closely and communicate regularly with the Operations Manager, members of the Board and other employees as necessary. Regular meetings for task and time management will be held with the line manager.

This is a developing role and the job description should be regarded as a general guide. A formal review of the job and any consequential job description will be undertaken during formal annual performance reviews.

Hours: 9am – 5.30pm, 37.5 per week

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## PERSON SPECIFICATION

	<b>Essential</b>
<b>Education</b>	Minimum A level education, a high degree of literacy is essential
<b>Experience/ Knowledge</b>	<p>Proven relevant administrative experience ideally within the property industry or customer services, but not essential</p> <p>Experience of management information systems desirable but not essential as training will be provided</p>
<b>Skills and abilities</b>	<ul style="list-style-type: none"> <li>• Excellent keyboard skills (a formal secretarial qualification would be desirable)</li> <li>• Demonstrable written and verbal communication skills</li> <li>• Computer literacy and competence in all applications of MS Office</li> <li>• Familiarity with spreadsheets and good numeracy</li> <li>• A keen eye for detail</li> <li>• Ability to handle a variety of complex tasks without loss of accuracy</li> <li>• Good organizational skills</li> <li>• Ability to work largely unsupervised and to use initiative</li> </ul>
<b>Attributes</b>	<ul style="list-style-type: none"> <li>• Conscientious, proactive approach to work</li> <li>• A team player and friendly disposition</li> <li>• Confidentiality and discretion</li> <li>• Well presented</li> <li>• Patience and tenacity</li> </ul>