

Client Support Assistant

Job Title:	Client Support Assistant
Location:	Swindon
Reports to	Client Support Manager

Overview

Your main duties as a Client Support Assistant (tm) will be to ensure that all new clients go through an efficient, streamlined, and consistent process when being registered as a TMG client or being set up for tmconnect by managing the onboarding process, co-ordinating activity between the sales team, CS, Finance and IT. You will be responsible for the accuracy and completeness of all paperwork and other inputs (New Client Form pricing, log-in details etc.) and ensure that the clients' registration and account set up information has been entered onto all relevant TMG systems.

You will need to ensure good lines of communication with your team leader and other colleagues and offer assistance to others when possible.

Key responsibilities

- Taking ownership of document processes, understanding platform set up, configuration and how each panel operates on the system
- Being a central point for all new client information for panel set up, onboarding new panel firms and supporting individual users if required.
- Manage the configuration of pricing schemes, document pack set up and work with IT to ensure activation is completed within the agreed timescales.
- Assisting Regional Sales Managers/Account Managers in the preparation of relevant paperwork and pricing details when registering clients.
- Ensuring that all details from the above are entered onto the TMG systems correctly.
- Communication of new clients to all operations and customer service staff.
- Making sure that all log-on details are communicated to client/Sales Manager as requested.
- Making contact with client as requested to make sure that their initial experiences of TMG exceed their expectations (phone/email).
- Support team members and Client Services on tmconnect systems, process and client panels.
- Assist colleagues in the Sales Support team with registrations, setting up packs and central pricing as required.
- Acting as point of escalation for new Panel firms for their first 3 months and providing new user training on the system.
- Resolving TMConnect email and telephone queries relating to the system or search orders.
- Prioritise your own workload and assist your team and other colleagues when required.
- Develop your own company and product knowledge and participate in relevant training.
- Deal with all telephone calls in a professional and efficient manner; making sure clients are given your full attention at all times.
- Ensure that query/complaint handling is dealt with competently.
- Establish, develop, and maintain a good rapport with clients, your team, our agents, and suppliers.
- To attend and contribute to department /team meetings.

- Ensure complaints are documented, handled and escalated in accordance with current Client Services procedures and Non-Conformance procedures.
- Ensure you operate in accordance with company policies and procedures.
- Maintain a safe working environment.
- Operate within with the Client Service Performance standards at all times.
- Other duties as reasonably required.

Performance Criteria

The Client Support Assistant will be successfully filling the requirements of the position when:

- All customer registrations and user configurations are completed with agreed timeframes.
- All your allocated client's inbound communication is handled within tmgroup SLA's or better and to a high professional standard.
- All issues are resolved, communicated internally and externally in accordance with current Client Services SLA's and procedures.
- The client continues to be highly satisfied and regularly transacting with tmgroup maintaining CSAT scores at the level set by Senior Management.
- Escalate any service or system issues accordingly
- Other duties as requested and assigned are completed successfully.

Role holder requirements

The Client Support Assistant will have proven experience in case handling or client management in a conveyancing environment or equivalent outside experience. A minimum of 1 years' service within tmgroup (or outside equivalent) and is passionate about client service.

Essential:

- Understanding of the value of customer service to an organisation.
- Excellent written, verbal and listening skills.
- Ability to handle and manage multiple clients effectively and within tight deadlines.
- Knowledge of property searches and TMG systems and procedures.
- Good understanding of levels of service required by TMG's customers.
- Accuracy, attention detail, methodical, investigative thinking.
- Ability to question processes and procedures in a constructive, analytical way.
- Good computer skills: MS Word, MS Excel, email etc.

Desirable:

- Have a "presence" within the department and wider company.
- Good understanding of communication, website based and bespoke tmgroup platforms.

Metrics

- Achievement of K.P.I.s as set by the Head of Client Services.
- Achievement of personal objectives as set by your line manager.
- H.S.E. compliance.
- HR. compliance.