

Position Description

Position	Title:	No.:	Reports to:	Title:	No.:
	Customer Support Officer (North)	HSF125		Sales Leader	HSF014
Business Unit:	Sales		Date created:	16/02/2017	
Division:	Retail		Reviewed:	01/11/2018	

Organisational Overview:

At HomeStart we believe that affordable home ownership is essential to the health, well-being and ongoing sustainability of our communities. HomeStart's role, within the framework of government policy, is to provide leadership and innovation in the housing finance sector by enabling more South Australians to fulfil their home ownership dreams. We do this through the provision of innovative housing finance solutions. More importantly, we do this through our core strength – our people.

Position Purpose:

The Customer Support Officer is responsible for providing new, existing, and potential HomeStart customers with relevant, accurate and up-to-date information to i) promote the organisation's products, ii) improve customers' home ownership and iii) increase/maintain HomeStart's loan portfolio. In addition the Customer Support Officer collects initial customer documentation to enable the customer to proceed to interview.

Our Values:

Achievement	Simplicity	Integrity
We are focused on creating positive outcomes for each other	We are focussed on simplifying the way we do business	We are honest and genuine with each other

Positions reporting to this position:

- Nil

Other significant working relationships:

Internal:

- Senior Lending Consultants, Customer Relationship Team, Sales Initiation Team, Retail, IT, Lending Operations, Executive Services, Finance, Marketing

External:

- HomeStart Customers, external lenders and referrers

Primary outcomes and accountabilities

Key results areas	Performance measures
Operational responsibilities	<ul style="list-style-type: none">• Attend to all incoming calls and provide customers with accurate and appropriate Home Loan information, including new and existing loan enquiries.• Handle all face-to-face customer interactions, existing or new and gather all relevant information to resolve or refer on as required.• Refer customers who are eligible for a HomeStart loan, to interview.• Follow-up customers to obtain relevant information to progress applications and scan/upload documents to the origination system as received.• Provide courteous, friendly, helpful and professional customer service to maximize the conversion of eligible enquiries to loan applications and approvals.• Assist broker team during peak periods with uploading applications.• Follow up customer calls where necessary.• Co-ordinate and conduct customer meetings as required.• Assist Senior Lending Consultants with any administration work and follow-up that is required to get loans ready for submission/settlement.• Follow-up enquiries to ensure every opportunity to convert the enquiry once qualified to a referral is maximised.
External Stakeholder Relations	<ul style="list-style-type: none">• Create and maintain conditions for effective relations with relevant external organizations, government agencies, customers and vendors where appropriate.• Respond to stakeholder queries in a prompt and courteous manner.
Corporate Responsibilities	<ul style="list-style-type: none">• Ensure the appropriate application and recording of risks according to HomeStart's Risk Management Policy and Practices.• Ensure compliance to HomeStart financial policies and procedures.• Ensure that all legal responsibilities attached to this role as noted in the Compliance Register are discharged, are properly recorded in the Risk Management System (RMS) and any breaches of these requirements are recorded as incidents in the RMS.• Maintain a commitment to EEO, Diversity, Ethical Conduct and the legislative requirements of the Work Health & Safety Act, 2012.• Model ethical behaviour and practices consistent with SA Government Code of Ethics for Public Sector Employees.• Understand and follow workplace safety initiatives and procedures, identify hazards and contribute to a safe working environment.

Behavioural profile

Achievement	<i>Takes personal accountability and demonstrates initiative, determination and drive to achieve high quality results and innovative solutions that make a difference to our people and customers.</i>
Self-Actualising	<i>Seeks opportunities to develop and grow. Shows an awareness of and belief in own abilities. Brings energy and creativity to positively impact and influence others.</i>
Humanistic-Encouraging	<i>Inspires, encourages, challenges and supports others to improve and grow by genuinely listening and providing constructive and timely feedback.</i>
Affiliative	<i>Acts in ways which promote and support HomeStart as one organisation with a common purpose and set of values. Is prepared to set aside own agenda in the interests of HomeStart as a whole as well as supporting and encouraging co-operation within and across teams.</i>

Other Requirements

Essential criteria

- 2 years experience working face-to-face with customers in a financial services lending environment.
- Excellent telephone manner.
- Good numeric and communication skills (both written and oral).
- Proficient use of personal computers and office equipment including Microsoft Office Suite.
- Good interpersonal and team skills.

Desirable criteria

- Certificate 4 in Finance and Mortgage Lending

Special conditions

- Completion of HomeStart Finance lending accreditation (within 3 months).
- Required to provide a satisfactorily National Criminal History Record Check (Police Check), where applicable.
- May be required to act in higher level positions, or assume additional accountability, as and when required.
- Flexibility in working across business units, including all metropolitan offices as required.
- May be required to work reasonable overtime with notice.
- Some out of hours and weekend work will be required, some intrastate/interstate travel may be required.

Acknowledgements

Signature

Name of employee

Date: _____

Signature

Name of leader

Date: _____