



Position	Case Progressor
Responsible To	Transaction Manager
Location	Poundbury (and all other locations as requested)

Key Objective

To be the initial, and thereafter proactive, point of contact for clients and introducers on all cases that the team is dealing with during the life of the transaction using customer service skills to update these parties on the progress of a case on a regular and proactive basis. Taking responsibility for maintaining the pipeline using solcase and the To Do lists to ensure that all cases are updated at all times. To assist with any other duties that may be reasonably required. Would ideally suite someone with sales /estate agency experience

Key Tasks

- To provide a friendly, knowledgeable and professional service to our clients (both internal and external)
- Providing first point of contact, answering telephones
- Making calls to clients and introducers on a regular agreed basis to update them on the progress of the case
- Forging and Maintaining good relationships with the different introducers to the business
- Reassuring Clients and introducers where necessary and communicating necessary feedback to the team for action
- Taking control of the frequency of updating and monitoring the pipeline for the team
- To ensure 'To Do' list is managed and dealt with within team targets
- To effectively maintain and housekeep Solcase, reflecting the stage of the file, including database, post it, schedule and history
- To ensure all telephone calls are dealt with/responded to within 2 hours of receipt, and that they are logged onto the post it screen
- All written communication to be clear and concise, to include post and emails
- To ensure any request concerning a work related matter received from the team leader is undertaken within the agreed timeframe. This may include chasing reports or action on a particular file.
- Checking client ID. To check and record using the appropriate office procedure.
- Opening of new files on Arista and Solcase using appropriate office procedures.

Other Areas

- Logging in and acknowledging receipt of documents received in solcase
- Opening the post and DX, record and accurately distribute all signed for post (as required)
- Preparation of all outgoing post and DX (as required)
- Filing and the maintenance of files.
- Accurately prepare routine correspondence on Solcase, ready for signature.
- Collating reports and documents, photocopying/scanning as appropriate

General Areas

- To provide cover as required for sickness and holiday
- To provide other administrative duties as required, which may necessitate working on another team at times
- To meet all deadlines within the agreed timeframe.
- To be proactive with regard to your own career development
- To develop transferable skills across the business
- Ensuring that this key role is valued by the team and the clients and introducers to showcase the effort that the team has put into the transaction and the benefits of using our service

This is a description of the job as it is presently constructed. This will be reviewed periodically and updated to ensure that the job description fully reflects the responsibilities of the job.

Health and Safety Statement

All employees must observe and comply with bpl's Policies and Procedures for Health and Safety.

Equal Opportunity Statement

All employees must observe and continually promote equal opportunities and customer care

Case Progressor Person Specification

Attributes	Essential	Desirable	How Identified
A Experience, Knowledge & training	<ol style="list-style-type: none"> 1. Effective verbal communication skills 2. Ability to communicate clearly in writing 3. Demonstrate good customer service skills 	<ol style="list-style-type: none"> 4. Minimum of 2 years experience working in a customer facing environment or call centre 5. Financial awareness 6. Knowledge of the conveyancing process 7. Experience of using a case management system or equivalent data base 8. Experience of working in a team towards set targets 	Application form Interview Application form Application fm & Interview Application fm & Interview Application fm & Interview Application fm & Interview Application fm & Interview
B Education Qualifications Training	<ol style="list-style-type: none"> 1. Minimum of 3GCSE's, or equivalent, to include Maths and English 2. Working knowledge of Microsoft Word and Outlook 		Application form & Certificates Application form & Interview
C Attitude and other skills	<ol style="list-style-type: none"> 1. Positive and enthusiastic attitude 2. Organised, can do approach 3. Accuracy, both financial and written 4. Flexible approach 5. Ability to multi task 6. Ability to work under pressure 7. Prioritise effectively and meet deadlines 8. Customer focused 9. Confident telephone manner 		Interview Application fm & Interview Application fm & Interview Interview Interview Interview

To apply please forward covering letter and cv to careers@bplaw.co.uk