

POST TITLE: Client Services Assistant
DEPARTMENT: Property Management
POST RESPONSIBLE TO: Client Services Manager



Principle is a forward-thinking, customer-focused managing agent providing professional property management services nationwide. Principle manages modern apartment buildings, traditional blocks of flats, mixed use developments, private housing estates and private rented sector (PRS) developments, as well as portfolios of rented properties for residential or commercial landlords. It is our vision to positively impact the everyday lives of our communities and this vision guides us to deliver the highest level of property management services to our clients and customers.

JOB PURPOSE

Client Services Assistants will support the management and administration of various client services tasks relating to the preparation of LPE1 & FME1 documentation, property transfers, sales pack enquiries, filing Management Agreements and keeping our property management system up to date in respect of the same, as well as various administrative tasks associated with the agreed processes relating to Leaseholder Deed of Certificates.

KEY ACCOUNTABILITIES

- ◆ **Resales Administration**
- ◆ **Customer Communications**
- ◆ **Notice of Transfers & other post completion documentation**
- ◆ **Maintaining system records effectively**
- ◆ **Effective use of enquiry management software**

MAIN RESPONSIBILITIES

- ◆ Respond promptly and professionally to sales pack enquiries
- ◆ Prepare LPE1/FME1 forms with attention to detail and accuracy, liaising with Property Managers as required
- ◆ Preparing supporting documentation and sending these and the LPE1/FME1 once approved by the Property Manager
- ◆ Ensuring proper maintenance of the resales tracker
- ◆ Monitoring payments in to the business and recording them on the resales tracker
- ◆ Being the first point of contact to deal with relevant customer enquiries via multiple channels including email & telephone
- ◆ Receive and process Notices of Transfers in a timely and organised manner, maintaining accurate records ensuring client preferences are adhered to at all times
- ◆ Liaising with clients to request Notice of Transfers where required
- ◆ Resolving a range of queries relating to property sales / transfers in a professional and timely manner
- ◆ Assisting with the preparation of post completion documents such as Deed of Covenants, Certificates of Compliance & Share Certificates and liaising with clients to arrange signatures on documentation where required
- ◆ Generating Management Agreements to be signed electronically by clients where applicable and ensuring accurate records are saved to Qube.
- ◆ Assisting with the administration of Leaseholder Deed of Certificates in line with the Building Safety Act 2022

OTHER

- ◆ Attend and contribute to team, department and business meetings
- ◆ Contribute to business-wide initiatives as required
- ◆ Any other duties commensurate with the nature of the post
- ◆ This is not exhaustive and will be reviewed periodically when adjustments may be made.

CONDUCT AND CUSTOMER SERVICE

- ◆ **Conduct**
You must conduct yourself at all times in a professional manner whether written, verbal, or face-to-face ensuring compliance with legislation relevant to Property Management and behaviours expected of a professional organisation.
- ◆ **Customer Service**
Continuously pursuing “Excellence in Customer Service”, looking for ways and ideas to improve the Company’s service, and accepting progressive change as a part of the office routine.
- ◆ **Training**
Undertake training where required by the business and have an open approach to learning.

PERSON SPECIFICATION

The ideal candidate will have the following knowledge, skills and qualities:

	Desirable	Essential
KNOWLEDGE		
◆ Leasehold block management experience	✓	
◆ Residential Landlord & Tenant knowledge	✓	
◆ GCSE’s or equivalent exams (5 A – C)		✓
◆ IRPM Qualified or working towards	✓	
◆ Knowledge of MRI (Qube)	✓	
◆ Residential Health & Safety knowledge	✓	
◆ Understanding of electronic and manual filing systems		✓
◆ At least 12 months experience working in a Customer Service role		✓
SKILLS		
◆ Drafting correspondence & dealing with single complex issue		✓
◆ Ability to train, monitor and instruct team members	✓	
◆ Good computer skills (Outlook, Word and Excel)		

	Desirable	Essential
◆ Proactive approach to problem solving		✓
◆ Good communication skills & call handling experience		✓
◆ Ability to report to more than one manager and allocate time effectively	✓	
◆ Time management with the ability to meet deadlines		✓

QUALITIES		
◆ Ability to handle conflict effectively and positively		✓
◆ Strength to work under pressure		✓
◆ Strong administration skills		✓
◆ Systematic approach to work		✓
◆ Ability to prioritise		✓
◆ Diligence and ownership of problems		✓
◆ Accuracy and efficiency		✓
◆ Flexibility and adaptability		✓
◆ Excellent communicator and telephone manner		✓
◆ Ability to use own initiative with a proactive approach		✓
◆ Works well as part of a team		✓