



## LOWTHER HOMES JOB PROFILE



### Job Details

<b>Job Title</b>	Commercial Agent	<b>Location/ Section</b>	Lowther Homes
<b>Service Area</b>	Lowther Homes	<b>Report to</b>	Customer Relationship Manager Income & Letting Manger Services & Products Manager
<b>Grade</b>	SCP 27 – 30	<b>Date Completed</b>	June 2021
<b>Disclosure</b>	Basic		

### Job Summary

Working in Wheatley’s single commercial subsidiary delivering private sector and commercial letting and property management services to partners and customers including other businesses. Operating within a strong performance culture you will be expected to deliver excellent performance results. You will be empowered to deliver ‘right first time’ services, offering personalised solutions. You will be instinctively customer focussed and have a ‘think yes’ attitude to ensure that our customers’ experience of our services is always positive. You will understand the importance of working with our supply chain and partners to achieve delivery of efficient and cost effective services and great customer and business outcomes.

You will work as a team to support the delivery of services from a customer experience perspective, driving creative and pragmatic solutions for customers and the business, inspiring loyalty in our customers.

### Behaviours & Competencies

#### Our Organisational Competencies

- Think Excellence
- Think Relate
- Think Collaborate
- Think Professionally
- Think Innovate

We want our Commercial Agents to be able to demonstrate the following behaviours and competencies:

- Put customers at the heart of everything we do
- Remove the barriers that get in the way of delivering excellent customer services
- Good commercial awareness and identification of opportunities to maximise turnover and profits
- Be a good listener and have excellent communication and interpersonal skills when interacting with customers or colleagues face to face, on the phone and using digital media.
- Excellent influencing and negotiating skills
- Ability to work using own initiative to find solutions
- Self-aware and self-motivated, able to take responsibility for own learning and continuous improvement
- Excellent time management skills and the ability to work under pressure, with minimum supervision
- Good IT skills
- Take personal pride in getting the job done
- Use professional judgement to achieve creative solutions and deliver great outcomes for customers
- Flexibility and a willingness to respond to the dynamic and changing needs of our organisation
- Ability to represent Lowther and the Wheatley Group in a positive and effective manner
- Take responsibility for achieving excellent performance results
- Ability to participate within and across various teams to achieve solutions for customers.

- Committed to pursuing excellence in line with the organisation's culture and values

## Person Specification

### Experience

#### **Essential**

- Our Commercial Agents must demonstrate the behaviours and competencies identified
- Proficient professional knowledge and track record in the delivery of property management, PRS letting or other customer focussed services in a results orientated environment
- Experience in organising and prioritising personal workloads
- Experience of delivering excellent customer services whilst balancing the needs of the business

#### **Desirable**

- Current driving licence

### Qualifications

#### **Essential**

- Recognised qualification in letting, or working towards, or willing to work towards, such a qualification

#### **Desirable**

- Recognised factoring qualification

## Job Outputs

Role output	Includes the requirement to:
Deliver continuous improvement in customer satisfaction and business performance	<ul style="list-style-type: none"> <li>• Deliver excellent customer service</li> <li>• Apply Think Yes to improve performance across the range of key performance indicators, with a focus on customer satisfaction and income.</li> <li>• Deliver value for money for our customers</li> <li>• Help ensure budget control and sound budget management</li> <li>• Understand the business performance management framework and the requirements of your personal contribution to assist in the delivery of business plan targets</li> <li>• Attendance and participation at team Think Yes/VMB/performance meetings/ appropriate forums</li> <li>• Develop and maintain an up to date knowledge of all Lowther products and services</li> <li>• Identify opportunities and grow profit including through maximising uptake of optional services and business growth</li> <li>• Strong analytical and problem solving skills, produce reports and statistical information, making recommendations as well as to inform own actions and decisions</li> <li>• Provide specialist advice and support to staff across Wheatley Group</li> <li>• Assist the smooth running of business as usual activity and projects.</li> </ul>
Ensure effective communication with customers and partners	<ul style="list-style-type: none"> <li>• Portray a positive image of Lowther and the Wheatley Group</li> <li>• Ensure customer commitments are delivered</li> <li>• Maintain appropriate levels of contact with customers ensuring they are kept informed of progress of complaints, enquiries or requests for service</li> <li>• Use face to face, digital and virtual media to engage with customers</li> <li>• Ensure that in all customer contacts the needs of the individual are balanced with those of the business</li> <li>• Attend meetings with customers to lead initiatives or resolve particular issues including attending and participating in local residents' meetings (these may be out with normal office hours)</li> <li>• Take ownership, investigate and resolve dissatisfaction and complaints from customers, applying creative thinking to identify personalised solutions, and feed learning into continuous improvements</li> <li>• Build good relations with internal and external service providers in order to ensure the provision of excellent Customer Service in a one and done, right first time, environment.</li> </ul>

<p>Deliver a comprehensive range of residential and commercial letting services</p>	<ul style="list-style-type: none"> <li>• Effectively deliver the letting process end to end including: <ul style="list-style-type: none"> <li>○ Marketing properties through a range of platforms and social media</li> <li>○ Effective communication with potential customers</li> <li>○ Assess prospective tenants' applications against our Letting Policy and process reference checks / credit checks</li> <li>○ Conduct viewings as and when required (this can sometimes be out with core hours)</li> <li>○ Compile and maintain accurate property inventories</li> <li>○ Inspect voids, arrange necessary repairs and works, liaising with contractors to ensure they meet agreed timescales.</li> <li>○ Manage checkouts, sign-ups and dates of entry</li> <li>○ Liaise with Development Team to ensure new build properties are brought to market and let quickly</li> <li>○ Liaise with Safe Deposit Scotland to register properties, lodge deposits and deduct any monies due for repairs, cleaning or damage</li> </ul> </li> <li>• Neighbourhood management including resolving anti-social issues</li> <li>• Prepare legal documentation for eviction processes</li> <li>• Effective house key management</li> <li>• Ensure any 3<sup>rd</sup> party reporting related to lets is completed and submitted i.e. Scottish Government returns.</li> </ul>
<p>Deliver a comprehensive range of factoring services</p>	<ul style="list-style-type: none"> <li>• Provide customers with a full range of factoring and property management information and advice</li> <li>• Ensure services are delivered in line with title deeds for every property, carrying out title deed checks where necessary.</li> <li>• Organise and facilitate proprietors' meetings, and support owners' committees and residents' groups, including out with core hours.</li> <li>• Ensure targets for resale information delivery to solicitors is met</li> <li>• Administer property resales</li> <li>• Effective delivery of business processes related to customer repairs, resales, buy-backs, common charges, buildings and contents insurance, representation mandates, and contractor activity.</li> <li>• Manage and facilitate business growth when new blocks of owners want to receive our services, from initial customer engagement, managing proprietors' meetings, through to completing customer sign up journey and ensuring all properties are logged accurately on our systems.</li> <li>• Provide information for escalated complaints investigations.</li> <li>• Prepare files and materials for complaints processes including First Tier Tribunal.</li> </ul>
<p>Income collection</p>	<ul style="list-style-type: none"> <li>• Ensure all customer accounts and properties are set up correctly on systems to ensure accurate charging</li> <li>• Process payments for rent, deposits, factoring fees and bills</li> <li>• Ensure timely and accurate monthly, quarterly and annual billing to customers, reminders and prompts to pay, including a sample audit of accounts prior to billing to ensure charges are correct.</li> <li>• Apply any rent or fee increases, as well as late payment fees where necessary to customers' accounts</li> <li>• Manage and minimise customer arrears taking a proactive customer engagement approach, and utilising a range of tools including agreeing payment arrangements, effective escalation to Group Debt Recovery Team and recovery through the courts.</li> <li>• Manage debt secured through the courts including with diligence activities</li> <li>• Trust deed administration and debt arrangement schemes</li> </ul>

Repairs, Maintenance & Utilities	<ul style="list-style-type: none"> <li>• Contact utility companies with meter readings and new tenant information</li> <li>• Ensure all tenanted properties have valid gas certificate, arrange annual gas safety checks &amp; distribute certificates to customers, ensuring any follow up gas recommendations are carried out</li> <li>• Identify and report repairs and maintenance issues in the properties we manage</li> <li>• Arrange repairs and maintenance works, monitor and follow up to ensure completion</li> <li>• Work with owners to organise cyclical maintenance programmes</li> <li>• Inspect and monitor neighbourhood management</li> <li>• Engage with and support customers on major repair and investment works keeping them informed, understanding their needs and liaising with the Repairs and Investment Team and contractors. For factored owners this includes facilitating proprietors' meetings, administering consent, monitoring payments and arranging refunds as necessary, issuing warranties and completion packs</li> <li>• Inform Lowther's asset management approach and priorities</li> </ul>
Ensure Compliance with professional, regulatory, statutory and corporate requirements	<ul style="list-style-type: none"> <li>• Ensure all required legislative documents are kept up to date</li> <li>• Ensure compliance with the Code of Conduct for Property Factors, Code of Practice for Letting Agents, tenancy and factoring agreements and leases</li> <li>• Ensure compliance with all legal requirements on Lowther as a factor, landlord and business and where we act for our partners or other customers in that capacity</li> <li>• Comply with and implement all our policies and procedures</li> <li>• Act ethically and with integrity, in line with the employee code of conduct</li> <li>• Keep all customer and property records up to date and accurate and in line with our retention schedules</li> <li>• Manage own p-card in line with procedures</li> </ul>
<p>Our Commercial Agents will have to demonstrate flexibility and a willingness to respond to the dynamic and changing needs of our organisation.</p>	
<p><b>Interdependencies</b></p>	
<ul style="list-style-type: none"> <li>• Customers</li> <li>• Managers</li> <li>• Lowther staff</li> <li>• Wheatley Hub / Customer Service Centre</li> <li>• RSLs</li> <li>• Neighbourhood Environmental Teams</li> <li>• Wheatley Solutions and W360 teams</li> <li>• Repairs teams</li> </ul>	