

CUSTOMER SERVICE ADVISER

ABOUT US

360 Dotnet created the software, 360 Lifecycle, for mortgage and insurance advisers. Whether it is arranging a mortgage or protecting clients against the unknown; we help businesses and clients succeed. We enable businesses to make a positive social impact, helping families to buy their homes and plan their financial future. Our customers choose us for our proven technology solutions, our expertise and our exceptional service.

Our software is trusted by some of the UK's best regarded financial advice brands. We have grown to become a major player in the mortgage intermediary software market; 20% of mortgage brokers rely on our software, our clients include leading names in UK financial advice, such as Alexander Hall and Quilter.

RESPONSIBILITIES & DUTIES

- To effectively manage large amounts of incoming calls and be the first point of contact for our users.
- To provide appropriate solutions and alternatives to issues (if an option) within the SLA time limits and follow up accordingly to ensure resolution.
- To ensure all customer interactions are recorded on the Helpdesk System.
- To ensure that the service provided to the end users of the systems is of the quality expected and to raise to the Customer Service Supervisor any failures in this category.
- To prioritise own workload, multi-task and manage own time effectively.
- To understand the priority levels for incoming calls and ensure that the escalation process is followed accordingly.
- To fully understand the needs of the end users and come up with solutions to their needs.
- To manage the expectations of end users, progressing calls that could turn into wider problems, identifying training needs, and coming up with solutions to these issues with the Customer Service Supervisor.
- To build strong relationships with users and clients through proactive communication.
- To use own initiative to pick up and take ownership of incoming calls and emails, and in looking for solutions to problems/queries and in engaging users with the systems.
- To use the knowledgebase as the first point of call for troubleshooting customer queries/issues.
- To ensure the knowledge base is populated with all issues encountered and resolved.
- To identify opportunities for upsell of products.
- To represent, promote and maintain a positive attitude and image for the Helpdesk team.

- To keep up to date with external factors concerning the company, especially in the Financial Services sector (e.g. MCD).
- To be able to work in an ever changing, fast paced environment, and adapt to this quickly and efficiently.
- To ensure product knowledge is always up to date, and to ask for additional support if/when needed
- Carry out any other duties appropriate to the role.

SKILLS & EXPERIENCE

- Customer service experience
- Excellent telephone manner
- Technical understanding
- Organizational and planning skills
- Able to work under pressure
- Self-motivated and pro-active

BENEFITS & OTHER INFORMATION

- 25 days holiday plus bank holidays
- Hybrid working between home and our Leicester office
- Hours of work 9-5.30, Monday to Friday
- You will be reporting to the Customer Service Supervisor
- Healthcare
- Pension scheme
- Access to Perkbox discounts to help employees live and work better
- Be part of an ambitious and expanding business who are looking at new markets
- You would work for an award winning company. We won Best Mortgage Technology Provider in 2021 at the Mortgage Awards and we won Best Technology Provider at the Financial Reporter Awards in 2018 and 2020.
- 6,000 users of our CRM within financial advice industry

Please email your CV to kieren@360lifecycle.co.uk