Surv Admin Support Officer



You're part of it

Our Purpose

Our purpose is to support the ambitions of the people and businesses of the UK by delivering specialist financial services.



Your Purpose

To successfully and pro-actively undertake all tasks associated with supporting the valuation instruction process.

To provide direct support to the Regional Surveyors and undertake the various tasks and activities that are associated with achieving this objective.

To also provide assistance to other areas within the business.

This will all support consistency of approach and the highest standards of service provided to the Group and our customers.



Your Purpose & Performance Profile

Our Strategy

Our strategy is driven by our purpose and helps us achieve our vision to become the UK's leading, technology-enabled specialist bank and an organisation of which our employees are proud. We focus on five strategic priorities to help us deliver our strategy. These are supported by three strategic pillars and eight values that underpin our culture and the way we do business.

Our strategy is to focus on specialist customers, delivering long-term sustainable growth and shareholder returns through a low risk and robust model.

Our Strategic Priorities

Growth

Growing our lending in specialist segments of the market where customers are underserved by the large, high street banks.

Diversification

Continually developing our range of savings and specialist lending products in both existing and new markets, organically and through acquisition.

Capital management

Management of capital is a critical lever as we invest to grow our business and people.

Digitalisation

Implementing sophisticated, digitally enabled, cloud-based platforms which enable us to deliver outstanding customer service, become more efficient, support decision making and address new markets.

Sustainability

Reducing the impact our operations have on the environment and ensuring we have a positive effect on our stakeholders and communities

Strategic pillars

A customer-focused culture

Expert knowledge and experience, supported by proprietary insight, data and analytics to deliver deep understanding and good outcomes for all our customers.

A dedicated team

An experienced, skilled and engaged workforce, and a unique culture underpinned by eight values.

Strong financial foundations

Prudentially strong, with a low-risk approach to lending, reducing volatility of earnings and enhancing sustainability of dividends.

Who you'll be working with

Providing support to the Surveyors team within the Portfolio Operations Division, Surv Admin work with a highly motivated professional team that provides specialist valuation advice and who pride themselves on being customer centric.

This role reports to the Surveyors Team Lead and will involve regular communication with others within the Surveyors area to ensure that the wider Surveyors team receives the booking and Administration support that it requires.

This Support Officer role wil principally involve daily contact with customers but also RS's and panel valuer firms on administrative queries arising and diary management.

Individual business units are our internal customers who require excellent communication, interaction, and service from Surv Admin.

There is also direct contact with our customers as part of the booking process who all require excellent standards in communication and flexibility to ensure excellent customer service and the earliest possible appointment booking to meet their needs.



The skills you'll bring

Demonstrate a proactive approach, being self-motivated and taking responsibility for tasks and full case management.

An understanding of governance, risk management (including property risk) and compliance frameworks.

Excellent organisational and time management skills, including the ability to work under pressure to deadlines.

Strong interpersonal, written, and oral communication skills. Proficient in using Quest, MS word, Excel and other tools with a willingness to develop skills further.

Deal with all work requests or enquires arising throughout the valuation process.

Monitor and action the valuation instructions on Quest.

Book sufficient appointments in order to achieve at least 3 appointments per day for each assigned Regional Surveyor.

Deal with all queries received via telephone, email and letter.



What you'll do day to day

- Ensure all valuations for all brands within PBG are processed within agreed targets
- Deal with all work requests or inquiries arising throughout the valuation process
- Monitor and process the valuation instructions on Quest
- Monitor and action the event queues within Aries Desktop and Novus Workflow
- Monitor and action work items on the Surveyors Portal
- Carry out all Miscellaneous Duties on a rota'd basis
- Book all valuation appointments for assigned Regional & Duty Surveyors
- Support assigned Regional Surveyors with achieving their weekly targets of 15 appointments per week
- Book sufficient appointments in order to achieve 3 appointments per day for each assigned Regional Surveyor
- Monitor & assist the Regional Surveyors when organising their calendars
- Monitor the Regional Surveyor Portal to ensure requests/queries are actioned within target
- Generate F6 reports via Quest as appropriate
- Assist other business areas to ensure audit requirements are complied with and industry recognition achieved
- Carry out regular housekeeping exercise to chase 'on hold' and 'tried' valuation instructions
- Carry out regular housekeeping exercise to chase panel surveyors re valuation instructions
- Deal with all queries received via telephone, email and letter
- Ensure all Learn Amp training sessions completed
- Undertake tasks to assist and support the Management team and other areas of the business
- Booking RS diaries with effective and efficient planning.
- Case ownership of each and every case from instruction to sign off to ensure turnaround targets are met.

What does success look like for you?

THINK CUSTOMER

You will work in a team who are accountable, able to adapt to change and have excellent customer service skills ensuring positive outcomes for our customers in meeting or improving on service standards.

You will manage the prioritisation of tasks and workflow of your day to day work.

As a Support Officer, be available to support your Regional Surveyor and ensure they have all available information.

You will assist with implementing change in a manner that maintains and enhances performance levels either as a team or indivudually.

Use the Duty Surveyor or referral to Surveyor in office to deal with queries arising that can be shared to reach a quicker more effective answer / outcome.

THINK RISK

You will assist in embedding a positive risk and feedback culture whereby people feel empowered to identify and raise risk appropriately.

To raise risk matters / events where identified.

You will ensure that you are up to date with current processes and understood to support the day to day activity.

To attend the weekly team meetings to discuss and ideas and feedback or support.

To attend training days that are diarised for important business updates and collaborative support.

Ensure that the Learn Amps and CPD are updated regularly to highlight any areas that may require development.

THINK PEOPLE

To lead by example in respect of team tasks.

Assist with initial support for new employees as well as supporting their training.

Ensure our culture and values are upheld and our leadership commitment is at the heart of actions and thinking.

You will help motivate individuals and the team to generate a positive working environment and produce work to a high standard.

You will help mentor and coach individuals on operational processes to ensure that their knowledge and skill levels are appropriate to carry out their duties where applicable.

Ensure that opportunities exist to draw upon your individual strengths. Also, to highlight weaknesses for support and development. This will be supported by your Team Leader.







THINK COMMERCIAL

You will manage daily workloads as well as planning for the relevant surveyors, ensuring that bookings are processed in a timely manner.

You will promote commercial thinking in dealing with opportunities to improve service.

You will help identify process efficiencies where applicable and support in any improvement processes and testing.

You will liaise with internal customers to ensure that your interactions are effective and will drive results.

Full case ownership from receipt of instruction until release of the report to the business area.



THINK SUSTAINABILITY

Work with the Surveyors on collaboration so route planning is most efficiently planned to avoid unnecessary journeys.

You will will look to contribute towards voluntary / charitable activities as appropriate.

Hybrid working as in line with the company structure and department requirements.



You'll make a real impact by:

Ensuring that the Surveyor diaries are booked to capacity and that booking targets are met (3 per day, per RS).

You will make sure that the bookings are processed within 48 hours and that the overall booking process does not exceed 10 days, as an average.

Attending team training days face to face to encourage collaboration and contribute to any training issues that may arise.

Full case ownership.

You will be accountable for your customer interactions and service, ensuring a positive experience and outcome for our customers. This will be monitored based on feedback.

You will ensure that all learning modules are up to date and that you are aware of any additional training available through Paragon and how that will help your development.

Helping coach others in the team as well as new starters playing into your own individual strengths, but also identifying where you yourself would require training.

Identifying potential risks and ensuring that these are processed correctly either through management or through the relevant department, including the Duty Surveyors.

Supporting the wider Surveyor teams reputation in the market as the leading team of Surveyors in the BTL market. A fully engaged team that shares ideas, knowledge and get involved will make the team a great place to be. Positive people drive positive action!

Personal objectives

If you have personal objectives that are additional to those in your Purpose and Performance Profile above, please capture them here:

If your role is included within the senior management / certificate regime you will be required to:

- Pass and maintain the requirements of the relevant Regulator's 'fit and proper test' as required by the Senior Managers Regime/ Certification Regime.
- Adhere to the Senior Manager Rules as part of the Senior Managers Regime as detailed below if SMR ROLE.
- Adhere to the Individual Conduct Rules as part of the Senior Managers Regime/ Certification Regime as detailed below.
- Be responsible for taking ownership and maintaining of your own Continuous Professional Development (CPD) Log as part of the Senior Managers Regime/ Certification Regime.

Senior manager function rules

1. You must take reasonable steps to ensure that the business or the firm for which you are responsible is controlled effectively.
2. You must take reasonable steps to ensure that the business or the firm for which you are responsible complies with the relevant requirements and standards of the regulatory system.
3. You must take reasonable steps to ensure that the delegation of your responsibilities is to an appropriate person and that you oversee the discharge of the delegated responsibility effectively.
4. You must disclose appropriately any information of which the FCA or PRA would reasonably expect notice.

Your development

We really want you to succeed within your role and your career. Nobody knows you better than you, and you are encouraged to take the lead on how you are doing and how you progress.

Please use this page to reflect on your personal learning and development; whatever that may look like for you.



What am I currently doing to support my learning and development?

What are my strengths and how can I make better use of them?

What would I like to learn next?

What are my career aspirations?

This might be how I learn and develop in my current role or how I develop towards a new role.

What resources / people can help me with my development goals?



Our values

Our culture is built upon a commitment to do the right things for customers, our colleagues, our wider stakeholders, and the world around us. Eight values underpin our culture and the way we do our business.

Doing the right things means making clear and ethical decisions, understanding the implications of our actions, being accountable for them and making a commitment to speak up and put things right where we see something that is wrong.



Fairness

To work together to ensure fair outcomes for all our customers



Professionalism

To maintain the highest standards and deliver our products and services with care and accuracy



Integrity

To be honest and open in everything we do



Humour

To ensure we have fun while achieving success!



Commitment

To drive the business forward with determination and to do so with effort and enthusiasm



Creativity

To identify and create new business opportunities and apply creative and effective solutions to problems



Teamwork

To work in harmony and collectively towards the delivery of our overall objective



Respect

To treat people as individuals and listen to their views

Our code of conduct

Our Code of Conduct is designed to help you navigate through the vast array of decisions that you will need to make to deliver effectively on our purpose. You can view a copy of our Code of Conduct **here.** As a regulated firm we are also subject to the below conduct rules:

1	2	3	4	5	6
You must act with integrity	**You must act with due skill, care and diligence**	**You must be open and co-operative with the FCA, PRA and other regulators**	**You must pay due regard to the interests of customers and treat them fairly**	**You must observe proper standards of market conduct**	**You must act to deliver good outcomes for retail customers**

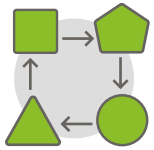
Our Leadership Commitment

We all deserve to have a great manager. Our managers commit to delivering inclusive, inspiring, and impactful leadership. For us, this looks like:



Empathy

Having and applying emotional intelligence to understand and engage with others more effectively. Using both self-awareness and the understanding of others to react positively to different situations.



Adaptability

Having the skills and willingness to adapt at pace to changing circumstances and environments. Being comfortable with ambiguity, maintaining personal resilience and learning from experience.



Creative Thinking

Having the skill to incorporate creative and innovative practices into tasks, activities and interactions, bringing new perspectives into the workplace.



Coaching

How we support others to explore and unlock their potential using coaching tools and techniques and building a trusting coaching relationship.



Teamwork

The coming together of a diverse group of people to deliver a common objective. Working well together, but open to new ideas and challenge. Creating a safe, inclusive environment to experiment, make mistakes and improve.



Think! Customer

How we build and maintain trusted relationships with internal and external customers based on a deep understanding of customers' needs. It's about communicating clearly and working in partnership.



Decision Making

How we make effective decisions on a day-to-day basis, taking ownership of decisions and demonstrating sound judgement.

If you are a manager of people you will help your people to be their best by:

Sharing our purpose	Checking in	Reward and Recognition	Career and learning	Performance enhancement
• agreeing objectives • reviewing them regularly • enabling continual improvement	• managing as a coach • providing and seeking feedback • agreeing and setting outputs • supporting employee well being	• providing in the moment appreciation (Mo) • celebrating achievements • rewarding fairly	• managing as a coach • enabling an employee led approach • agreeing development plans • supporting aspirations	• providing timely and honest feedback • plan for success by agreeing a clear plan of action with goals and required support identified and reviewed regularly

Frequent and meaningful conversations

HR0146-003 (06/2023)