

**Title:** Customer Service Specialist -SCMS

**Status:** Employee – Salary

**Reporting to:** VP Originations

**Function:** Ensure Origination Partners and consumers initial contact with Spectrum-Canada **ALWAYS exceeds expectations** by providing 'extra mile' service.

**Providing an 'extra mile' level of service means always giving the customer more than they expect. This means you treat every one of your customers like you'd treat a best friend – someone you'd go the extra mile for.**

Integral part of team responsible for streamlining the process of referrals from the initial receipt from Origination Partner through to the hand-off to assigned Mortgage Advisor.

**Major Responsibilities:**

- Enter initial inquiry information into Spectrum Mortgage Information system
- Maintain relationships with Origination Partners through timely phone calls to acknowledge receipt of referrals (within 2 hours of receipt)
- Contact client's to obtain any additional information required to complete applications and to set appointments for initial conversation with assigned Mortgage Advisor
- Accurately enter all client information into Spectrum Mortgage Information system
- Pull an Equifax or Trans Union credit bureau on each applicant where same is not attached
- Enter credit bureau information (trade lines including minimum monthly payments) accurately into system
- Forward complete file to assigned Mortgage Advisor .
- Keep files (paper and computerized) in an organized and accurate manner.

**Competencies:**

***Integrity***

- Consistently and without exception uphold Spectrum Canada's standards of quality and ethics when dealing with others, customers, and colleagues

***Customer Service***

- Acts as an advocate to ensure that the needs of the customer are met while balancing the needs of the business
- Takes action to exceed customer expectations

***Results Oriented***

- Overcomes obstacles and challenges in order to achieve objectives
- Persistently focuses on what is important to the organization and works to achieve those goals

***Team Orientation***

- Demonstrating trust and respect for Team members
- Influences strong morale and spirit within team
- Contribute to a stable, high energy, enthusiastic work environment.

***Self management and motivation***

- Consistently demonstrate an excellent work ethic, time management and time keeping.
- Show a strong sense of ownership for all aspects of the role and the success of the company in general.

**Skills:**

Organized and thorough  
Accurate and efficient data entry skills  
Telephone skills  
Excellent communication  
Good Computer skills