



CLIENT MANAGER JOB DESCRIPTION

Reporting to: Sales/Lettings/Commercial Manager

Summary: Personally responsible for developing market share by generating Client Visits and Instructions and Third Party related income

KEY RESPONSIBILITIES:

- To assist the manager in developing the largest dominant market share for on market and under offer properties
- Personally, achieving high levels of proactive calls and Client Visits
- Management Responsibility for running the Client Visit generation section of the opportunity report and achieving all follow up activities on time
- Responsibility for high conversion levels of Client Visits to full service sole agency Instructions and Third-party sales with additional products and premium fee services
- Responsibility for High Quality marketing to include photographs, descriptions and web marketing
- Responsibility for excellent compliance levels of Money laundering, EPC's, CPR and Admin documentation
- Responsible for excellent client care of personal and branch Instructions to include revisits and price reductions
- Ensure Client Care meeting is effectively run with the team and enables delivery of engaging and effective client contact and actions each week
- Responsibility for achieving high sell through rate of personal and branch instructions
- Responsible for generating excellent client feedback and the generation of client testimonials and case studies

THE ROLE:

- Daily review of Opportunity report Client Visit Generation section and conversion of opportunities into Client Visit's and instructions
- Daily review of Third-Party potential opportunities and conversion to company target levels and in every case not to perform below company minimum standards
- Daily Review of Not on Web opportunity line
- Daily review of Board Penetration opportunity line
- Daily review of Outstanding Viewing Feedback opportunity line
- Daily review of viewing feedback – utilising the mobile feedback app and the price slider
- Daily Review and contacting/door knocking of competitors new Instructions for 14 day cooling off Instruction opportunities
- Weekly Client care to high standards with NG email notes to company processes
- Weekly booking and carrying out of Client revisits
- Daily uploading of PRE Client Visit clients and PRE Client Visit properties to target levels
- Daily door knocking and dropping of wanted leaflets to generate LHTS/Investor applicants and PRE

- Client Visit clients and properties
- Specifically prioritise targeting of main roads for board penetration on high visibility routes
- Daily review of new deals passed to SST/SLT for solicitor & FS/ Reference and referral engagement
- Proactively seeks out and passes opportunities to other departments such as Lettings, Commercial, New homes and Land

MANAGEMENT & BUSINESS STRUCTURE

- To adhere to and actively implement all elements of the company Business Priorities and Client Standards document, and ensure that all staff understand and focus on implementing them. This Job list should be read in conjunction with that document
- Support the manager ensuring branch performance is above targets and assist colleagues with their action plans to improve where performance weaknesses exist.
- Support the Manager in ensuring the branch fully complies with all regulatory requirements, company priorities & standards and has the highest standards of customer service and client care consistently.
- Ensures delivery against the Client Standards and the company is delivering a complete service which retains clients and maximises opportunities. Ensure all clients receive a weekly call regardless of viewing activity to re-enforce quality feedback, undertake competing property analysis and where appropriate plan for potential price reductions agreed. Ensure there is an NG note emailed to the client to reflect this
- Upholds company standards at all times. Acts as a role model for all within the branch and ensures that personal and team behaviour and presentation is exemplary at all times
- Ensures that the branch is focused on performing to standards that will engender positive customer service reviews from customers. These reviews must be actively sort from all customers and they should be encouraged to post them online through the company approved partners
- Ensures that accurate information is given by staff regarding availability and viewing arrangements of properties to call applicants and that staff use the interest tab to record enquiries
- Ensures quality file notes are made every week. Ensures the NG email notes facility is utilised to ensure effective client and customer communication and to allow for informed negotiations at all times.
- Ensures that every property marketed is done so in line with CPR guidelines and that a CPR review has been done prior to marketing commencing so that the correct information can be provided to customers enquiring about the property
- Attends all training courses relevant to your role to enhance your knowledge and improve your performance.
- Weekly participation on conference calls with pre-prepared information and action list update
- Ensure all fees and contract terms are above minimum fee level with any exceptions being approved in writing by a company director in advance

ANNUAL PERFORMANCE BUDGETS (SUPPLEMENTARY TITLES SUBJECT TO BEING IN THE ROLE 12 MONTHS)

Sales	Instructions	Net Sales from instructions	Annual Net Sales/Exchanges from instructions
Client Manager	50	30	£150,000
Senior Client Manager	75	38	£225,000
Executive Client Manager	100	60	£300,000
Lettings	Instructions	PIS from instructions	Exchange income from instructions
Client Manager	50	40	£150,000
Senior Client Manager	75	60	£225,000
Executive Client Manager	100	80	£300,000

Client Visits: All levels have a budget of 5 Client Visits booked per week

Sales:

Annual Net Sale & Exchange income from deals done- £160,000

Or

Net Sale & Exchange volume from deals done- 35 units

Conveyancing and FS sign ups must be at a rate of 50% of the net sale and instruction volume achieved Two 5* online reviews must be achieved per month

Lettings:

Annual Exchange income from deals done- £160,000

Or

PIS volume from deals done- 45

Refurbishment referrals processed, must be at a rate of 10% of the PIS volume achieved

DRS deals must be at a rate of 40% of PIS, and 75% of Instructions must be DRS approved

Referrals to Virgin Media must be at a rate of 75% of the PIS volume achieved

FS sign-ups must be at a rate of 30% of PIS and Instruction volume achieved

Two 5* online reviews must be achieved per month

COMPLIANCE REQUIREMENTS

- Adherence to all sales, lettings and administration procedures
- Adheres to companies Money laundering policies
- Ensure staff undertake suitable risk assessments when carrying out viewings to ensure their safety and the safety of customers and clients.
- Ensure high standards of staff interaction are maintained so that staff treat each other with mutual re-spect at all times and the team is one which people would aspire to work within
- Follows HR policy and procedures and raises matters to the HR Advisor or Line Director
- Ensures accurate data is entered into NG at all times and that all client records are held and managed in accordance with Data protection guidelines
- Ensures that the branch marketing activity is fully compliant with the company brand and compliance guidelines
- Follow CPR, Ombudsman and ARLA code of conduct and has passed the relevant examinations i.e. CPR, OEA, ARLA, NAEA etc.
- Secure and maintain industry recognised qualifications, for example ARLA/NAEA Membership

- Complies with Brand guidelines

PERSON SPECIFICATION:

- Excellent communication skills over the telephone and face to face to ensure the development of strong working relationships
- Able to take a lead role in branch activity and drive sales conversion
- Enthusiastic and proactive with a strong work ethic
- Possesses the ability to act as a role model by adhering to company standards, whilst continuously ex-ceeding activity and income targets
- Able to liaise with clients and customers confidently and professionally
- Ambitious and career orientated

Estate Agency Recruiters

Matthew Davies-Pascoe 07779 149963

LinkedIn bit.ly/3AAEgDN

matthew@estateagencyrecruiters.com

Derek Gardner 07834 303460

LinkedIn bit.ly/3P9CiON

derek@estateagencyrecruiters.com