

Job Description

Position Title: Sales Assistant
Reports To: Branch Manager

Grade:
FLSA: Non-Exempt

Position Overview: Sales Assistant will support regional customer base via phone. Responsibilities will include operational and sales customer training and increase of sales volume through pipeline management. Will also interact with the broker to determine customer needs and interacts with operations to satisfy those needs.

Responsibilities and Duties *includes the following responsibilities, but not limited to:*

SALES:

- ◆ Responsible for building strong relationships with brokers.
- ◆ Responds promptly and courteously to broker status calls; coordinates special needs through the appropriate staff member.
- ◆ Provide broker training on systems as needed.
- ◆ Maintains constant Brokers contact on status of conditions, file movement and Branch turn times.
- ◆ Follows up on lock expirations for both un-submitted and approved files to ensure funding within lock period.
- ◆ Maintain pipeline reports on assigned territory.
- ◆ Manages pipeline reports with emphasis in closing loans or attaining new loans.
- ◆ Make outbound calls to existing assigned customer base by telephone and e-mail for the purpose of managing AE's pipeline and increasing business.
- ◆ Schedule weekly meetings with regional AE's on pipeline activity.

OPERATIONS:

- ◆ Prepares and audits files for documents to be drawn and/or funded including hazard, title, survey, fees, locks, etc.
- ◆ Assists in logging in conditions, new files, and funding packages.
- ◆ Answers product questions and resolves customer service issues.
- ◆ Reviews 80 closed loans per month.
- ◆ May sign off on underwriting conditions under guidance of the Sr. Underwriter.
- ◆ Demonstrates excellent product, underwriting, and compliance knowledge, combined with good problem solving skills.
- ◆ Maintains conversation log in Data Trac to properly track the forward movement of the file.
- ◆ Handles a high call volume, and must prioritize and accomplish various tasks at any given time.
- ◆ Acts as a liaison between corporate lock desk, Branch and broker to provide special rate quotes, existing lock changes/extensions
- ◆ Provides assistance to brokers with pricing, systems, lock and process questions.



Physical and Environmental Conditions:

Office environment, equipment and tasks, including work at a computer terminal which requires repetitive keyboarding and data entry. Partial sitting and walking throughout the day. Must be open to work overtime, as needed, to complete assigned tasks.

Preferred Qualifications

- ◆ Requires three (3) to four (4) years industry experience.
- ◆ Two (2) years as a processor/Customer Service Representative or similar function.
- ◆ Previous inside sales or outside sales experience.
- ◆ Demonstrated extensive experience as a senior level processor, or in an underwriting related function and have a rudimentary understanding of Underwriting and training in signing off on non UTR conditions.
- ◆ Has a working knowledge of Lock Coordinator position and policies.
- ◆ Ability to work independently in a fast-paced environment.
- ◆ Intermediate experience with Microsoft suite of products
- ◆ Ability to work in a fast paced environment
- ◆ Excellent Internal and External Customer Service
- ◆ Resourceful
- ◆ Be able to work as part of a team
- ◆ High level of integrity
- ◆ Adapts well to change
- ◆ Excellent verbal and written communication skills
- ◆ Self starter