



| Job Description and Person Specification<br>Customer Liaison |   |   |   |
|--|---|---|---|
| <b>Salary</b>  | £23,000 to £25,000 Full Time Per Annum                  | <b>Place of Work</b>                          | Heatherton Park Studios, Bradford on Tone, Taunton, TA4 1EU |
| <b>Hours of Work</b>   | 7.5 hours a day, Mon – Fri with alternating Fridays off | <b>Reporting to</b>                           | Senior Case Manager   |
| <b>Personal Loan Authority</b>                               | NONE  | <b>Senior Management Certification Regime</b> | N/A   |
| <b>Champion</b>  | NONE  |   |   |

### About Lendology

Lendology CIC is a B Corp, social enterprise lender. We work in partnership with local authorities to provide finance to homeowners for home repairs, improvements and renewable energy measures. Our work is designed to provide a social impact over profit. Our service is based on strong partnerships with a variety of organisations from the public, private and charitable sectors and our lending decisions are made by people, for people. Passionate about the environment, we have been Carbon Neutral accredited since 2022 and we continue to work on a Carbon Reduction Plan to achieve net zero by 2030.

**Our Vision:** A world where everyone can improve their lives through inclusive finance.

**Our Mission:** We provide dynamic lending solutions to maximise social and environmental impact.

**Our Values:** Not just words, our values are reflected in everything we do, regardless of whether you are a customer, partner or colleague.

**Respectful:** We are considerate of the needs, abilities and qualities of our colleagues, customers and partners.

**Expert:** We are proud of our knowledge and expertise and the positive impact that brings to our customers and partners.

**Dynamic:** We engender a positive attitude, full of energy and new ideas to continuously develop our services, products and relationships.

**Supportive:** We help each other, our customers and partners to thrive and succeed.

### Job Purpose

The Customer Liaison acts as the organisation's primary point of contact providing clear guidance and consistent support throughout the lending journey.

You will handle inbound enquiries, lead prospective customers through the loan application with clarity and warmth, and remain their trusted point of contact once funds are released. By providing accurate information, timely

documentation, and empathetic assistance – particularly to vulnerable individuals – you will deliver an excellent customer experience from first call to final repayment.

### **Key Work Roles**

- Embody our Code of Conduct and Values and embed the principles of Consumer Duty across all activities, evidencing a strong commitment to the financial well-being of our customers
- Respond promptly to telephone and digital enquiries, signpost or escalate where appropriate.
- Telephone excellence – build rapport quickly, communicate complex information in plain language, and manage difficult conversations with confidence and tact.
- Application support – guide applicants through forms, evidence gathering, affordability checks, and any accessibility adjustments they may require.
- Account servicing – issue regular statements, balance confirmations, redemption figures, and settlement letters within agreed timescales.
- Multi-channel assistance – resolve queries via phone, email, webchat, and post, ensuring records are complete and accurate.
- Administrative accuracy – maintain customer files and update the Loan Management System.
- Team cover – pick up overflow tasks and provide holiday or sickness cover so service levels never dip.
- Continuous improvement – suggest and help implement process enhancements, including the adoption of new technology such as AI tools.

### **Other Duties**

This is not intended as an exhaustive list of duties. Other duties as may be reasonably required will form part of this job description.

### **Skills/Attributes**

#### **Essential**

- Proven success in a customer-facing role with significant telephone interaction
- Outstanding verbal and written communication, able to adapt style for vulnerable customers
- Empathetic approach and the resilience to handle sensitive conversations
- Meticulous organisation and high numerical accuracy
- Confident user of MS Office

#### **Desirable**

- Experience in financial services
- Knowledge of social impact lending or community support programmes
- Familiarity with FCA compliance requirements
- Familiarity with local authorities
- Understanding of safeguarding principles
- Working knowledge of AI tools