
Job Description

Position: Customer Experience

Focus: Customer service, supporting closers, general customer info processing

Pay: hourly, range \$14 - 19, based on training & experience

Hours: 40 hours per week, (8 hours per day).

- **Overtime:** only with approval from team lead

Office hours: Mon. – Fri., 8:45 am – 5:15 pm (generally these apply, but it can vary)

- **Flexibility:** start earlier or stay later, permission from team leader required
- **Breaks:** as needed, unpaid, up to 90 minutes per day (e.g. lunch, wellness)

Time off: after three months, 12 days per year, unpaid, (see Office Policy PowerPoint)

1. Three important characteristics of someone in this position:

- a. **Friendly.** Genuinely likes being with and talking to people.
- b. **Resourceful.** Eager to find ways to serve people with solutions for their needs.
- c. **Unflappable.** Rarely if ever offended by a rude or an angry person.

2. Help Closers [*primary concern for this position*]

- a. Assist Closers (typically 2-4 closers in the office) as they ask for help with title, escrow, and settlement matters.

3. Customer Service [*majority of the job*]

- a. Arrive 15 minutes before office opens, i.e. at or before 8:45 am every day. Being fully available to provide customer service at 9 am.
- b. Attend to Walk-ins
 - i. Make great first impressions! To all who enter the door. Welcome and greet team members and customers with a genuine smile and a kind word.
- c. For closings: attend to Realtors; Buyers, Sellers, Borrowers refinancing.
 - i. Greet, and notify them of the status of their closing. Ask to please have a seat if waiting for their client or if the closer is not yet available.
 - ii. Buyers/Sellers/Borrowers on refi: Ask for identification, and instruct customer, “please make yourself comfortable, while I make a photocopy of your id.”
 - iii. Notify team member of customer’s presence.
 - iv. Copy ID. Return ID, advise guest of when closer will be available to see them. Offer complementary beverage,
- d. Phone
 - i. Answer all incoming calls within 2 rings.
 1. The first ring allows other team members to answer.
 - ii. Answer with a smile because it changes your vocal cords, and the person on the line can tell.
 1. Give Caller your name, ask for their name, property address, who they have been working with from our office, how you may help them.
 - iii. No one is on hold more than twenty-four seconds.
 - iv. Distribute messages to team members.
 1. Accuracy counts: (i) who is on the line or called; (ii) what is/was the inquiry, (iii) when do they need the information, and if applicable when did they call
 - v. Return personal messages within 24 hours
- e. Email

- i. Follow company policy (see Office Policy PowerPoint)

4. Pre-Closing Settlement prep work

- a. Request receipt of Home Warranty invoice [usually (B)'s Agent orders & (S) pays]; [If possible, coordinate this w/ Disbursement Authorization (DA) request & scheduling closing]
- b. Ask realtors if they will be sending over a DA or Pay at the Table (coordinate w/ scheduling closing)
- c. Scheduling Closings [typically realtors will call and ask to schedule with you over the phone]
 - i. Inquire a/b scheduling closing or m/o for Buyer(s) -- include agent if applicable
 1. Closing date/time scheduled for (B)
 2. Buyer's Agent notified of closing day/date/time/location
 - ii. Inquire a/b scheduling closing or m/o for Seller(s) -- include agent if applicable
 - iii. Closing date/time scheduled (S)
 - iv. Listing Agent notified of closing day/date/time/location

5. Pre-Closing Title work

- a. Surveys.
 - i. Inquire w/ agents, or parties, a/b survey, if applicable order; confirm who is ordering the survey; order, if applicable
 - ii. Receive survey, review, upload and send survey to buyer, buyer's agent, lender
 - iii. Add in survey exceptions to Commitment Exceptions (B2)
- b. Download current deed from county property appraiser's site; use to enter seller info in Qualia
- c. Order title search through Qualia integration with titlewave.net
- d. Order/request code violation search & confirm receipt
- e. Order/request permit search & confirm receipt
- f. Order title search bringdown/update TitleWave

6. Post-Closing Settlement work

- a. Scan signed closing docs into Qualia for Seller
- b. Scan signed closing docs into Qualia for Buyer/Borrower
- c. Scan signed closing docs into Qualia for Funding
- d. Send Final Signed Docs to Realtors, Buyers, Sellers, Borrowers.
- e. Put in envelopes and mail hundreds of invoices, letters, and checks each week, using stamps.com

Desired Outcome (D.O.) while working (serving others) at Bright Light Land Title Company.

Please describe:

- *Desired Outcome (D.O.) within the first (365 Days):*
- *Within the first 180 Days D.O.:*
- *Within the first 90-Days D.O.:*
- *Within the first 30-Days D.O.:*