

JOB DESCRIPTION

Job Title	Membership Documents Team Leader
Department	Membership
Responsible For	Management the Membership Documents Team
Job Grade	4
Reports to	Membership Manager

Job Purpose:

To manage the Membership Documents function to provide effective and efficient Membership Documents of PPD member firms and provide excellent customer service.

Main Duties and Responsibilities:

- To manage and improve systems and processes for obtaining and recording the necessary annual evidence to show that PPD applicants and members meet their company obligations, including:
 - The review validation and recording of Membership documents, including PI insurance, accountant's reports, company declarations and other documents as required. Where documents are inaccurate, incomplete or invalid to obtain additional information as required. To manage the recording of CMP levy payments against the appropriate invoice and organisation, including the investigation and resolution of CMP payment queries and anomalies.
 - The review, update and amendment of company records, including legal entity checking.
- To manage the Membership Document team to achieve the above, assisting where necessary, including:
 - The setting of objectives for all team members.
 - Conducting regular 1 2 1's.
 - Absence management.
 - To support and develop of the team as a whole.
- Membership Documents systems maintenance and development.
 - To continually review the systems and processes undertaken by Membership Documents and investigate potential improvements.
 - To plan the implementation of such improvements in Membership Documents processes.
 - To liaise with the Membership Manager and Compliance Manager to include plans to implement any proposed changes and improvements.
 - To plan and implement changes to Membership Documents made necessary by changes in Propertymark regulation requirements.
 - To liaise with the Membership Manager and Compliance Manager to propose changes to the Propertymark Conduct and Membership Rules made necessary by required changes in Membership Documents.
 - To work with the IT to plan for improvements in processes to enable the automation and more efficient and effective execution of aspects of Membership Documents.
 - To liaise with Membership Manager, Marketing Manager and Compliance Manager to propose improvements/changes to the website content and marketing materials to ensure content is clear and correct regarding membership documents and the rules.
- To deal with complex and difficult queries from members, accountants and other Propertymark staff where necessary.

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- To work with the Membership Management Team to ensure the cohesive working between the Membership Documents and Membership Application & Renewals Team, to achieve the overall aims of the Membership Department.
- To liaise with Propertymark Regulation regarding qualified accountant's reports and any other matters arising.
- To undertake a regular debtors review, working closely with Finance to ensure swift collection and allocation of payments received.
- To ensure the team provides excellent customer service to all members and customers, at all times.
- To undertake legal entity checks and full PPD checks as necessary.
- To undertake other duties for the Membership Manager as required.

Key working relationships:

- Members and Potential members
- Membership Manager
- Membership Documents Team
- Membership Team
- Regulation Team
- IT Team

Job Requirement / Skills

- Working knowledge of Microsoft office
- Analytical and problem-solving skills
- Managing challenging and complex situations
- Excellent organisational and time-management skills
- Excellent customer service skills
- People management skills
- Excellent oral and written communication skills

Education / Experience:

- Level 3 in Business Administration/Leadership & Management or equivalent and/or educated to A Level standard
- GCSE English & Maths or equivalent
- Experience managing a team
- A basic understanding of legal entities is desirable
- Compliance or document management experience desirable