



REDESIGN YOUR CUSTOMER CARE MODEL

WITH YUJEIL SHOL



**HOW YOU CAN PROVIDE
ELITE SERVICE AT SCALE**



Customer Care Checklist

1. Define What “Good Service” Actually Means

- Clear service standards documented (response times, follow-ups, touchpoints)
- Service expectations aligned internally - not assumed
- Client experience designed intentionally, not reactively

If service isn't defined, it can't be delivered consistently.

2. Map the Client Journey End to End

- Initial enquiry → application → settlement → post-settlement
- Identify where clients currently feel ignored, confused, or delayed
- Separate “high-impact moments” from low-value admin

3. Redesign Roles, Not Just Tasks

- Clear ownership of customer care at each stage
- Broker focuses on advice and relationships - not chasing admin
- Support roles aligned to outcomes, not inboxes

Customer care breaks down when everyone is “helping” but no one owns it.

4. Build Proactive Communication Into the Model

- Clients are updated before they need to ask
- Standard check-ins scheduled, not remembered
- Repricing and reviews treated as ongoing service, not one-off events

5. Systemise Follow-Ups and Reviews

- Repricing cadence defined and automated
- Annual and milestone-based reviews built into workflows
- No reliance on memory or manual reminders

6. Use Tech & Offshore to Remove Friction

- CRM used as a service tool, not just a database
- Automation supports communication without losing personal touch
- Visibility across pipeline, care, and retention

Technology should reduce workload - not add complexity.







ABOUT WINGMAN GROUP

Australia and New Zealand's fastest-growing offshoring provider.

MORTGAGE BROKING OFFSHORE TASK LIST

LOAN PROCESSORS		
Data Entry	Lodgement	Settlement
<p>CRM Data Entry to ensure all client data from supporting documents is correct, and that all supporting documents are saved.</p>	<p>Lodge deals via Apply Online.</p>	<p>Prepare Discharge Forms.</p>
<p>Documents Saved with the correct file name and within the correct subfolder.</p>	<p>Liaise with Lender/Assessor to ensure they are satisfied with all the documents and are prepared to offer the loan to the client</p>	<p>Prepare Lender Forms and send to client for signing.</p>
<p>Send Compliance Documents to be signed by the Client. Includes the Credit Guide, Privacy Statement, and Credit Proposal.</p>	<p>Update the Client every 2-3 days on how their application is progressing.</p>	<p>Liaise with Client Solicitor and Lender Solicitor to coordinate settlement</p>
<p>Populate lender application forms accurately from broker notes or client fact-finds.</p>	<p>Validate figures entered in the lender serviceability calculator against the broker's notes.</p>	<p>Confirm Settlement and Loan information with the Client.</p>
	<p>Double-check lender portal.</p>	<p>Update status to "Settled".</p>
		<p>Prepare settlement instruction sheets or checklists for broker review.</p>

CUSTOMER CARE		
Client Onboarding	Maintenance	Adhoc Requests
<p>Confirm Loan Details with Client including that linked accounts are set up correctly, credit cards have been received, ensure internet banking is working, confirm repayment frequency and amounts.</p>	<p>Conducting Annual Reviews and checking pricing with their current lender on the anniversary of the loan.</p>	<p>Generating reports (e.g. pipeline, settlement, or commission summaries).</p>
<p>Point of Contact for Client moving forward (unless the client requires additional lending, in which case the Broker gets involved).</p>	<p>Fixed Interest & Interest Only Expiries, ensuring the client's loan doesn't default to an uncompetitive rate.</p>	<p>Supporting the onboarding of new brokers or team members by setting up access, file structures, and trackers.</p>
<p>Enter or update client contact details, referral source, and deal owner.</p>	<p>Construction Loan Drawdown Requests, organising on behalf of the client with the lender.</p>	<p>Following up with lenders on progress draws, valuation status, or loan documentation delays.</p>
	<p>Populate rate-reduction or repricing request forms for broker submission.</p>	<p>Submitting bank account detail changes or repayment frequency amendments to lenders.</p>



CREDIT

Loan Structure & Package

Assess client scenario to determine the most suitable lender options based on policy, servicing, and loan structure.

Work closely with the broker to structure the deal effectively

Calculate servicing capacity and recommend the most viable product options

Compare loan products and rates across multiple lenders based on broker guidance.

Rename files according to lender naming conventions.

System & Documentation

Review and verify client data within the CRM and lender platforms.

Complete internal checklists and submit comprehensive deal notes for seamless processing.

Conduct **regular data hygiene** checks - ensuring inactive or duplicate records are archived or merged correctly.

Ensure all data entered into CRMs and trackers aligns with the brokerage's workflow stages (e.g. "Onboarding," "Lodged," "Settled").

Post Submission

Liaise with lenders for scenario clarification.

Manage any credit critical follow-up and escalate urgent matters to the Broker

Notify the broker once all **conditions are satisfied** and ready for final approval.

Update checklists for each condition and assign follow-up tasks (e.g. valuation, updated statements, insurance).

Maintain updated copies of conditional approval letters.

OTHER SUPPORT

Administration

Ordering **settlement gifts**.

Managing **calendars** and **inboxes**.

Send confirmation emails or SMS reminders for appointments.

Organise digital files and maintain naming consistency across systems.

Track post-meeting and post-call notes.

Marketing

Manage email marketing contacts and **send monthly newsletter**.

Use Canva templates to create and **post social media tiles** and stories.

Assist with sourcing relevant **content for social media** e.g (articles, RBA updates).

Send Google review requests to recently settled clients.

Operations

Prepare slide decks or visual dashboards for internal reporting meetings.

Assist with onboarding or offboarding brokers or RPs.

Record lender SLAs, rate updates, and policy changes in shared tracker.

Prepare weekly "Pipeline Snapshot" reports (settlements, pre-approvals, lodgements).



Hosted by Wingman

@hostedbywingman

wingmangroup.com.au/webinars