# ROLE SUMMARY

**Job Title: Credit Controller**

**Responsible to: Deputy Finance Manager** **/ Group Finance & HR Lead**

**Updated:**

**All staff must implement and comply with Halifax Opportunities Trust policies and procedures including Health & Safety, Safeguarding, Equal Opportunities and Confidentiality.**

#### The main purpose of this role is to contact customers who have fallen into arrears with their payments and it involves four main areas of responsibility:

* **Supervisory Activities** to manage customer relationships through effective communication
* **Development and delivery of services** efficient collection and input of data to monitor services
* **Information Management** provide effective communication and collection of data and evidence
* **Assets** Delegated responsibility for the HOT security, resources and equipment

## Responsibilities

#### Key Results Area One Supervisory Activities

* To develop an understanding with the customer and their circumstances
* Agreeing sustainable methods of payment

#### Key Results Area Two Development and Delivery of Services

* Chasing debt by phone call, letters and by email
* Negotiate and monitor payment plans with debtors
* Production of weekly/monthly report
* Updating records
* Accuracy of data

#### Key Results Area Three Information Management

* Delegated responsibility of data input and extract using the accounting software packages
* Delegated responsibility to ensure that all HOT management information is inputted within scheduled deadlines
* Delegated responsibility for monitoring and data cleansing of HOT information

#### Key Results Area Four Assets

* Access to confidential data and information
* Maintaining records of work
* Support with the up keep of asset registers

**Personal Development**

* Take responsibility for own personal and professional development, in line with agreed annual performance objectives
* Attend and complete actions from regular supervision sessions with line manager
* Adopt a creative and innovative approach towards practice by being open to opportunities for improvements, and encouraging staff to make suggestions
* Attend regular staff meetings, training days and other training as required
* Maintain up to date knowledge regarding legislation

## Interfaces

|  |  |
| --- | --- |
| Internal:   * HOT Board * EWIC Board * HLEC Board * Senior management team * Finance Department | External:   * Key suppliers * Stakeholders * Contractors * Tenants * Customers |

The responsibilities reflect the core activities of the role and are not intended to be exhaustive. Other activities or duties may be required, or changes in emphasis needed, from time to time to meet the needs of the organisation and it is expected that the role-holder will adopt a flexible approach in this respect. All roles and responsibilities are regularly reviewed and revised where necessary to ensure that organisation needs continue to be addressed.