Comparison of Job Descriptions within Operations Documentation

Performance Factors	Closing Manager	Closer I	Closer II	Processor I	Processor II
Core Compentiencies					
Action Oriented: Enjoys working hard, is action oriented and full of energy for the things he/she sees as challenging, not fearful of acting with a minimum of planning, seizes more opportunities than others.	X	X	X	X	X
Approachability: Is easy to approach and talk to, spends the extra effort to put others at ease, can be warm, pleasant, and gracious; is sensitive to and patient with the interpersonal anxieties of others, builds rapport well, is a good listener, is an early knower, getting informal and incomplete information in time to do something about it.	X	X	X	X	X
Dealing with Ambiguity: Can effectively cope with change, can shift gears comfortably, can decide and act without having the total picture, isn't upset when things are up in the air, doesn't have to finish things before moving on, can comfortably handle risk and uncertainty.	X	X	X	X	
Ethics and Values: Adheres to an appropriate (for the setting) and effective set of core values and beliefs during both good and bad times, acts in line with those values, rewards the right values and disapproves of others, practices what he/she preaches.	X	X	X	X	X
Functional/Technical Skills Has the functional and technical knowledge and skills to do the job at a high level of accomplishment.	X	X	X	X	X
Informing: Provides the information people need to know to do their jobs and to feel good about being a member of the team, unit, and/or the organization, provides individuals information so that they can make accurate decisions; is timely with information.	X	X	X		
Learning on the Fly: Learns quickly when facing new problems, a relentless and versatile learner, open to change; analyzes both successes and failures for clues to improvement, experiments and will try anything to find solutions, enjoys the challenge of unfamiliar tasks, quickly grasps the essence and the underlying structure of anything.	X	X	X	X	
Listening Practices: Attentive and active listening, has the patience to hear people out, can accurately restate the opinions of others even when he/she disagrees.	X	X	X	X	
Organizational Agility: Knowledgeable about how organizations work, knows how to get things done both through formal channels and the informal network, understands the origin and reasoning behind key policies, practices, and procedures, understands the cultures of organizations.	X	X	X	X	X
Patience: Is tolerant with people and processes, listens and checks before acting, tries to understand the people and the data before making judgments and acting, waits for others to catch up before acting; sensitive to due process and proper pacing, follows established process.	X	X	X	X	X
Perseverance: Pursues everything with energy, drive, and a need to finish, seldom gives up before finishing, especially in the face of resistance or setbacks.	X	X	X	X	X
Presentation Skills: Is effective in a variety of formal presentation settings: one-on-one, small and large groups, with peers, direct reports, and bosses, is effective both inside and outside the organization, on both cool data and hot and controversial topics, commands attention and can manage group process during the presentation, can change tactics midstream when something isn't working.	X	X			
Priority Setting Spends his/her time and the time of others on what's important, quickly zeros in on the critical few and puts the trivial many aside, can quickly sense what will help or hinder accomplishing a goal, eliminates roadblocks, creates focus.	X	X	X	X	X
Self-Development: Is personally committed to and actively works to continuously improve him/herself, understands that different situations and levels may call for different skills and approaches, works to deploy strength, works on compensating for weaknesses and limits.	X	X	X	X	X
Self-Knowledge: Knows personal strengths, weaknesses, opportunities, and limits, seeks feedback, gains insights from mistakes, is open to criticism, isn't defensive, is receptive to talking about shortcomings, looks forward to balanced (+'s and -'s) performance reviews and career decisions.	X	X	X	X	X
Technical Learning: Picks up on technical things quickly, can learn new skills and knowledge, is good at learning new industry, company, product, or technical knowledge, does well in technical courses and seminars.	X	X	X		
Time Management: Uses his/her time effectively and efficiently, values time, concentrates his/her efforts on the more important priorities, gets more done in less time than others, can attend to a broader range of activities.	X	X	X	X	X
Written Communications: Is able to write clearly and succinctly in a variety of communication settings and styles, can get messages across that have the desired effect.	X	X	X	X	X
Functional/Technical Skill					
Will be part of a team of writers responsible for handling the closing of files.	X	X	X		
Must demonstrate exemplary skills in	X				
	X				
Responsible for ensuring all final documentation products are usable and correct.	X				
	X				
	X	X	X	X	
Establishes and maintains communication between BridgeSpan and customers.		X			
		X	X		
		X	X	X	X

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Performance Factors	Closing Manager	Closer I	Closer II	Processor I	Processor II
		X	X	X	
		X	X		
		X			
		X	X	X	X
		X	X		
		X			
				X	X
Handles various administrative duties as needed by the departmental staff.				X	X
				X	X
Supervisory Responsibility					
Potential to directly supervise up to **eight (8)** employees.	X				
Potential to directly supervise up to **five (5)** employees.		X			
Carries out supervisory responsibilities in accordance with the organization's policies and applicable laws.	X	X			
Responsibilities include training and mentoring of employees; planning, assigning and directing work; assisting in the appraising of performance; and addressing complaints and resolving problems.	X	X			
This position has no formal supervisory responsibilities.			X	X	X
This position will be expected to mentor and assist all team members with their assigned projects and daily tasks, using formal and informal methods.			X		
Education and Experience					
Bachelor's degree (B.S.) in	X	X	X		
Associate's degree (A.A.) in				X	X
Or a minimum of **5** years mortgage industry experience.	X	X			
Or a minimum of **3** years mortgage industry experience.			X		
Or possessing a certificate in the mortgage industry.				X	X
Or equivalent combination of education and/or experience.	X	X	X	X	X
Demonstrated knowledge of MS Excel.	X				
Minimum of **two (2)** years experience as a manager or supervisor, or demonstrated leadership ability.	X				
Minimum of **one (1)** year experience as a manager or supervisor, or demonstrated leadership ability.		X			
General understanding and competence with Windows-based computers and Microsoft Office, particularly Outlook and Word is required.	X	X	X	X	X
Must have basic familiarity with the Internet and related applications, including email and Web browsers.	X	X	X	X	X
Must have an **advanced** understanding of mortgage industry principles.	X				
Must have an **basic** understanding of mortgage industry principles.		X	X		
Must have an **advanced** understanding of management principles.	X				
Must have an **basic** understanding of management principles.		X	X		