

Loan Consultant

This interview guide is intended to be used in conjunction with the Vervoe skills assessment. Where a candidate has scored Low - Medium on a skill, focus on asking more questions from that skill to gain deeper insight into their level of competency.

Assessment Score	HIGH MEDIUM LOW
Assessment Skills	Loan Consultant, Thorough, Financial Literacy, Stakeholder Engagement

Competency/Skill	Candidate with this will display
Loan Consultant	<ul style="list-style-type: none"> • Has a sales mindset and actively looks for opportunities to connect with more clients • Ability to manage multiple clients and processes at once • Maintains knowledge with changing markets
Questions	
	How do you secure new business as a loans consultant?
	How do you ensure you're kept up to date with the latest trends in the market?
	What are your biggest challenges as a loan consultant? How do you overcome these?
Comments	

Competency/Skill	Candidate with this will display
Thorough	<ul style="list-style-type: none"> • Draws up and finalises loan contracts for clients • Ensures facts and figures are correct for contracts • Has fail proof systems in place to ensure details are accurate and all aspects are covered for making loan decisions
Questions	
	What processes do you have in place for quality assurance in your work?
	Can you describe a time where you have made a mistake due to lack of attention to detail? How did you find this?
	How do you ensure you have all the information you need to make a final decision?
Comments	

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Competency/Skill	Candidate with this will display
Financial Literacy	<ul style="list-style-type: none">• Competent with financial market and able to explain this to their non-finance clients• Keeps up to date with changing markets and market trends
Questions	
	In your own words, how do interest rates impact borrowing trends?
	What was the last thing you learnt that helped you do your job?
	What blogs, articles, releases, events do you keep up with?
Comments	

Competency/Skill	Candidate with this will display
Stakeholder Engagement	<ul style="list-style-type: none">• Able to liaise with a range of stakeholders and clients to interview to determine financial eligibility for loans• Builds trust and loyalty with clients and external stakeholders• Actively builds networks for potential clients and with external providers
Questions	
	How do you build trust and loyalty with customers?
	How do you walk through the process with a new client who does not understand where to start?
	Describe a time where you found it hard to build a relationship with a client. Why was it difficult? What was the result?
Comments	