

## JOB DESCRIPTION

<b>Job Title:</b>	Mobile Branch Customer Advisor	<b>Job Band:</b>	5
<b>Department:</b>	Branches	<b>Location:</b>	All Branches
<b>Accountable to:</b>	Branch Team Leader	<b>Number of Direct Reports:</b>	0
<b>Job Purpose:</b>	<p>A Mobile Branch Customer Advisor is required to cover at any of our Branch locations.</p> <p>Deliver outstanding service over the counter, over the telephone and whilst processing and administering customer queries.</p> <p>Action customer administration activities efficiently and effectively, with great attention to detail completing all tasks to a high-quality standard.</p> <p>Complement the existing team by taking ownership for your development, bringing a positive can-do attitude and supporting other branches as needed.</p> <p>Act as a champion for local community activity in your area.</p>		

MAIN DUTIES	
<b>OPERATIONS:</b>	
<b>Counter service:</b>	Deliver an outstanding and positive customer experience by being polite, helpful, professional and demonstrating our society values in all of our face-to-face interactions.

<b>Telephone service:</b>	Deliver outstanding customer service, and a positive customer experience through answering inbound telephone calls and making outbound telephone calls confidently, efficiently and professionally taking time to answer customers questions and support their needs.
<b>Administration:</b>	Action customer applications, tasks and other administrative activity promptly, ensuring attention to detail and a high-quality standard.
<b>Branch Operations:</b>	Support the smooth operation of the branches by following all branch protocols around the opening and closing of branches, keeping all keys secure, maintaining a cash float, banking cash and reconciling the tills daily.
<b>Promoting products and servicing.</b>	Have pro-active discussions with our customers on the products and services the Society offers through great value adding conversations and maximising customer appointments.
<b>Doing the right thing by our customers.</b>	Make sure all the information provided on Society products meet the needs and requirements of the customer and is clear, fair and not misleading.
<b>Deliver objectives:</b>	Work as part of the team to achieve individual and branch objectives making sure that you demonstrate savings standards in all interactions and activities.
<b>Teamwork:</b>	Demonstrate great teamwork through supporting the wider savings teams and other branches as required.
<b>Build relationships:</b>	Build enduring relationships and work collaboratively with the wider Society departmental functions to better support customer journeys.
<b>Marketing &amp; Products:</b>	Support the Marketing and Product team on the internal and external promotions of Society products and services as needed.
<b>Safety:</b>	Maintain a secure environment by adhering to health and safety requirements including wearing security fobs.
<b>Regulatory:</b>	<p>Comply with all Anti Money Laundering (AML) and Terrorist Financing regulatory requirements including:</p> <ul style="list-style-type: none"> <li>Carrying out prescribed customer due diligence measures (CDD) for all customers (including appropriate enhanced due diligence (EDD) measures, where applicable) before establishing a business relationship and at appropriate times during the business relationship in accordance with documented procedures.</li> </ul>

	<ul style="list-style-type: none"> <li>• Understanding the law and personal obligations and responsibilities under it and the potential legal and regulatory penalties for any breach / non-compliance.</li> <li>• Completion of training as required in order to attain and maintain knowledge and continuing competence in AML systems, controls and procedures.</li> <li>• Reporting knowledge or suspicion of any money laundering or terrorist financing activity promptly in accordance with procedures.</li> </ul>
<b>Conduct Risk:</b>	Carry out all duties taking into account the FCA's Conduct Risk requirements and principles of Treating Customers Fairly.
<b>Conduct Rules:</b>	Carry out all duties in compliance with the FCA's Conduct Rules as applicable to the role (as detailed in the Code of Conduct Sourcebook (COCON).
<b>Policy &amp; Procedure:</b>	Carry out all duties following and promoting the guidelines within documented policies and procedures, demonstrating adherence to the Society's policies.
<b>Risk:</b>	<p>Maintaining a strong risk awareness within your role:</p> <ul style="list-style-type: none"> <li>• Make sure all relevant controls are implemented and are operating effectively.</li> <li>• Report of all risk events identified promptly.</li> <li>• Escalate immediately risk issues which have the potential to breach the Society's appetite for risk / control environment.</li> </ul>
This job description will be amended in consultation to reflect changes in or to the job.	
<b>DATE:</b>	

## PERSON SPECIFICATION

CRITERIA	ESSENTIAL	DESIRABLE
QUALIFICATIONS	<ul style="list-style-type: none"><li>• Level 2 Qualified (GCSE, O'Levels, Functional Skills)</li></ul>	
EXPERIENCE	<ul style="list-style-type: none"><li>• 1 year experience within a customer service role</li></ul>	<ul style="list-style-type: none"><li>• Experience working in a regulated environment</li></ul>
KNOWLEDGE		<ul style="list-style-type: none"><li>• Basic knowledge of savings accounts or the financial services environment</li></ul>
SKILLS AND ATTRIBUTES	<ul style="list-style-type: none"><li>• A passion for customer service.</li><li>• Strong communication skills.</li><li>• Attention to detail.</li><li>• Organisation skills</li><li>• Full clean driving license</li></ul>	
PERSONAL ATTRIBUTES	<ul style="list-style-type: none"><li>• Team player</li><li>• Positive can-do attitude</li><li>• Flexible</li></ul>	