

JOB DESCRIPTION

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| Job Title: | Mobile Branch Customer Engagement Specialist | Job Band: | 5 |
| Department: | Branches | Location: | All Branches |
| Accountable to: | Branch Team Leader | Number of Direct Reports: | 0 |
| Job Purpose: | <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 | |
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| OPERATIONS: | |
| Counter service: | 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. |
| Telephone service: | 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. |

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| Administration: | Action customer applications, tasks and other administrative activity promptly, ensuring attention to detail and a high-quality standard. |
| Branch Operations: | 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. |
| Promoting products and servicing. | Have pro-active discussions with our customers on the products and services the Society offers through great value adding conversations and maximising customer appointments. |
| Doing the right thing by our customers. | Make sure all the information provided on Society products meet the needs and requirements of the customer and is clear, fair and not misleading. |
| Deliver objectives: | Work as part of the team to achieve individual and branch objectives making sure that you demonstrate savings standards in all interactions and activities. |
| Teamwork: | Demonstrate great teamwork through supporting the wider savings teams and other branches as required. |
| Build relationships: | Build enduring relationships and work collaboratively with the wider Society departmental functions to better support customer journeys. |
| Marketing & Products: | Support the Marketing and Product team on the internal and external promotions of Society products and services as needed. |
| Safety: | Maintain a secure environment by adhering to health and safety requirements including wearing security fobs. |
| Regulatory: | <p>Comply with all Anti Money Laundering (AML) and Terrorist Financing regulatory requirements including:</p> <ul style="list-style-type: none"> • 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. • Understanding the law and personal obligations and responsibilities under it and the potential legal and regulatory penalties for any breach / non-compliance. |

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

PERSON SPECIFICATION

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