

 PROGRESSIVE BUILDING SOCIETY	<h1>Job Description - Staff</h1>
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JOB FAMILY:	Branch
JOB TITLE:	Customer Service Assistant
REFERENCE #:	Staff
LOCATION:	Various branches – Post holder will be require to rotate across branches as required.
REPORTS TO:	Branch Manager
CERTIFICATION STAFF:	No
T&C SCHEME LEVEL	<p>Level 1 – this role holder is not allowed to give advice or recommendation on any of the Society's regulated products or services.</p> <p>The post holder will remain competent to perform their role through supervision and review of their performance based on their skills, knowledge and behaviour.</p>
JOB PURPOSE:	To provide excellent customer service to our Members including administration and support services
KEY TASKS:	<p><u>ROLE SPECIFIC</u></p> <ul style="list-style-type: none"> ▶ Acting as the first point of contact in face-to-face, online or telephone interactions, offer a professional, friendly and personalised service in a manner that builds Member engagement and reflects the Society's values. ▶ Take ownership for dealing with enquiries in an engaging manner and hold effective conversations that demonstrate empathy and an understanding of individual Member life events through a sensitive and caring approach (e.g. bereavement, vulnerability etc.), following up as required. ▶ Encourage and demonstrate the use of Progressive Online to our customers. ▶ Show enthusiasm and dedication towards achievement of sales targets. ▶ Identify opportunities where other Progressive products or partner services would be beneficial to our Members. ▶ Maintain knowledge of our products and procedures. ▶ Operate branch systems and accurately carry out a range of daily tasks including start and end of day processes, till operations, account / miscellaneous transactions, till balancing, nominal receipts and withdrawals processing. ▶ Carry out a range of savings tasks in relation to account opening, receipts and withdrawals, account closure, death of investors, non-personal accounts, and account amendments, showing attention to detail.

- ▶ Perform other counter related activities as required.
- ▶ Provide additional support to savings and mortgage processes as deemed necessary by Branch Management.
- ▶ Maintain knowledge of branch and security procedures.
- ▶ Adhere to the Society's Treating Members Fairly standards.
- ▶ Liaise efficiently and professionally with Head Office teams, our business partners and solicitor firms as required.
- ▶ Provide cover when required in other branches as required

ROLE GENERIC

- ▶ Contribute to the achievement of the Society's Corporate Plan.
- ▶ Participate in the day-to-day activities of the team and work effectively as a team member, ensuring that the highest standards of member service and work output are achieved.
- ▶ Keep abreast of the latest innovations and developments, relative to your remit.
- ▶ Ensure compliance at all times with Society, regulatory and statutory requirements.
- ▶ Help implement new practices, positively responding to change and make suggestions to drive continuous improvement.
- ▶ Meet performance measures and KPIs set for you and your team.
- ▶ Communicate in a timely and effective manner with members of your team and other parts of the business.
- ▶ Participate in training & development opportunities.

GENERAL

- ▶ Demonstrate the Society's values in behaviours and actions.
- ▶ Produce the highest standard of work possible in accordance with the Society's Policies, T&C Scheme, Conduct Rules, Codes of Practice and operational procedures.
- ▶ Comply with Information & Cyber Security controls as relevant to your day to day duties.
- ▶ Work safely as a member of a team to carry out Health & Safety working practices.
- ▶ Carry out any other function necessary for the smooth running of the branch / department.

	All Job Descriptions are subject to review and amendment at any time as dictated by Society needs.
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I acknowledge receipt of this job description

Signed Name :		Date:	
Print Name:			

Issue	Amendment History	Date
01	Initial Release	