PROGRESSIVE BUILDING SOCIETY

Job Description - Staff

JOB FAMILY:	Branch
JOB TITLE:	Customer Service Assistant
REFERENCE #:	Staff
LOCATION:	Various
REPORTS TO:	Branch Management
JOB PURPOSE:	To provide excellent customer service to our Members including administration and support services
KEY TASKS:	ROLE SPECIFIC - 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.
- Support cover in other branches including occasional Saturday mornings.

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.

I acknowledge receipt of this job description

Signed Name :		**Date:**	
Print Name:			

Issue	Amendment History	Date
01	Initial Release	