

Job Description



Job Title	Branch Manager	
Date & Version	March 2025	Version: 1.0
Reports to:	Branch Network Business Development Manager	
Direct Reports:	Customer Assistants	
Produced by:	Head of Branch Network and Customer Support	



Derby



Full Time, Permanent



35 hours

Job, purpose and scope

To lead branches under their responsibility, ensuring the delivery of great customer experiences and desired customer outcomes.

To recruit, develop, and lead their branch team, ensuring that all objectives are achieved to support the delivery of the Society's Corporate Plan.

To be an ambassador for the Leek Building Society brand building and developing relationships within the local community.

To lead by example demonstrating the Society's Values and deliver the expectations set out in branch objectives through the balanced scorecard approach.

Duties and key responsibilities

People Management And Leadership:

- Effectively performance manage the team through clear documented objectives, timely feedback, recognition of great performance, and quickly addressing concerns.
- Observe direct reports interactions with customers, providing coaching and identify training needs, to continuously improve the customer experience, and promote the Society's products and services.
- Deliver coaching and staff development to the standards in T & C schemes.
- Manage branch resource levels
- Delegate effectively, to prioritise key deliverables, and matching team skills to tasks.
- Role model a proactive approach to continuous improvement and promotion of the Society e.g. proactive outbound contacting, training, self development, projects etc.
- To drive an empowered culture with your team and role model empowerment in your day to day working
- To plan and organise your activities ensuring the Branch runs effectively and delivers its business requirements

Duties and key responsibilities

Customer Service:

- Plan and lead daily branch meetings to set the expectations and ambitions for the day.
- Ensure all branch staff are identifying customer needs effectively and positively promoting Leek BS products and services, including mortgages, investment, pensions, protection and home insurance.
- Manage any complaints or negative feedback in a timely manner, in accordance with the Complaints Process.
- Encourage customers to provide feedback.
- Conduct customer interviews and serve customers, demonstrating to your team 'what good looks like'.
- Ensure that all aspects of the branch operates efficiently, and transactions and administrative duties are carried out accurately, in line with Society procedures.
- Identify and support the continuous improvement of customer experiences through the challenge and development of customer processes.

Risk Management:

- Embed the expected risk culture, ensuring that staff understand relevant risks and how these risks are mitigated.
- Undertake Management Control checks in a timely manner, escalating any concerns.
- Proactively report, record and analyse risk incidents.
- Ensure effective management of all aspects of cash and till control.
- Ensure policies regarding staff/customer safety and security are adhered to.
- Ensure the branch meets all its regulatory requirements, including adherence to the FCA's Code of Conduct and the consumer duty principles
- To deliver the Branch Training and Competence scheme
- Achieve satisfactory Compliance/Audit/Risk reports.
- Be aware of the Society's Anti-Money Laundering systems and controls and follow the Society's procedures

Society Ambassador And Community:

- Drive and lead the branch, displaying role model behaviours and promoting a "1 team" culture.
- Be an ambassador, and enhance the profile of the Leek BS brand within the local area by proactive engagement with local schools, business groups, charities, and non-profit organisations.
- Develop and maintain relationships with key local community groups or charities.
- Ensure that volunteer days are utilised, and activities are promoted internally and externally.
- To annually review and rotate chosen local charities to ensure we support a wider part of the local community
- To monitor the impact you make on local communities incentives
- Ensure that the branch premises and staff always present a professional image.

Duties and key responsibilities

Results Orientation:

- To embrace and deliver a commercially focused culture with your branch and team
- To deliver against your branch balanced scorecard
- To drive a franchise growth mentality delivering a continuous improvement year on year
- Undertake a Branch Manager Champion role to support a specific objective/project.
- Make a positive contribution to Branch Manager meetings and workshops.
- Support other branches when required.
- Collaborate with Head Office colleagues to improve overall customer experience and operational effectiveness.

Conduct Obligations

Conduct Rules

All employees and NEDs are expected to act in accordance with the PRA and FCA Conduct Rules:

- You must act with integrity.
- You must act with due skill, care and diligence.
- You must be open and co-operative with the FCA, the PRA and other regulators.
- You must pay due regard to the interests of customers and treat them fairly.
- You must observe proper standards of market conduct.
- You must act to deliver good outcomes for retail customers.

Financial Crime

All employees and NEDs are expected to:

- Be aware of their personal legal obligations and the legal obligations of the Society in relation to Financial Crime
- Be aware of the Society's Anti-Money Laundering systems and controls and follow the Society's procedures
- Be alert for anything suspicious in respect of money laundering or fraud and report any suspicions in line with internal procedures
- Do not discuss any suspicions with anyone outside of the Society and do not 'tip off' a customer or prejudice an investigation

Person Specification

Qualifications and knowledge	• A good level of numeracy and literacy • Basic knowledge of financial services • Awareness of different leadership approaches and how to support and positively influence others, including through role modelling and informal coaching
Experience	• Experience of leading teams that develop customer relationships in a face-to-face environment • Experience of a customer service environment is essential • Experience of working effectively as part of a team is essential • Previous line management experience/team leadership • Experience of working in a financial services role is preferred
Skills and abilities	• Passionate about delivering exceptional customer service through leading and developing customer facing teams • Leading by example • Determined, resilient and positive outlook • Ability to work unsupervised and demonstrate initiative • Strong influencing/ team leadership skills • Ability to see bigger picture and articulate how the branch contributes to the Society's Corporate Plan • Ability to identify and address underperformance in a timely manner • Confidence to challenge where appropriate and contribute to the overall success of not only the branch but also the wider Branch Network • Demonstrate the ability to coach and develop team members
Other requirements	• Flexibility to work across different branch or office locations as required • Willingness to occasionally work outside standard hours to support business or community events

