

Job Description



Job Title	Customer Assistant	
Date & Version	May 2026	Version: 4.0
Reports to:	Branch Manager	
Direct Reports:	None	
Produced by:	Branch Network Business Development Manager	



Derby



Full Time, Permanent



35 hours

Job, purpose and scope

To deliver excellent customer service by building strong relationships with existing and new members and promoting the Society's products and services.

The role holder will contribute to the overall success of the branch by working collaboratively with colleagues, supporting team performance, and demonstrating leadership behaviours through role modelling, knowledge sharing, and a proactive approach to continuous improvement.

Duties and key responsibilities

Customer Service

- Build strong relationships with customers, promoting member loyalty through high-quality interactions across face-to-face, telephone, and digital channels.
- Identify customer needs and recommend appropriate products and services, either directly or through referral to specialist colleagues.
- Operate within open member areas, proactively engaging with customers to enhance their experience and maximise service opportunities.
- Demonstrate flexibility and adaptability to meet customer needs in line with the Society's Values.
- Deliver all transactions accurately and efficiently, ensuring compliance with operational procedures and balancing requirements.
- Undertake outbound customer contact to promote products and services where appropriate.
- Act as a role model for excellent customer service, setting standards for others through behaviour and approach.
- Share knowledge and best practice with colleagues to drive consistent service quality across the team.
- Demonstrate awareness of how behaviour and communication impacts others, adapting approach to support positive outcomes.
- Identify and support the continuous improvement of customer experiences through the challenge and development of customer processes.
- Encourage customers to provide feedback
- Conduct customer interviews adhering to the T&C scheme

Duties and key responsibilities

Risk Management and Branch Security

- Adhere to all Society policies and procedures to mitigate risk and ensure compliance at all times.
- Identify, escalate and report risk events in line with the Risk Management Policy.
- Maintain high levels of accuracy and attention to detail in all work activities.
- Support a positive risk culture by encouraging adherence to policies and raising concerns appropriately.
- Deliver a getting it right first time culture and learning from errors so no repeats
- Comply with all regulatory requirements relevant to the role.

Society Ambassador

- Act as an ambassador for the Society, consistently demonstrating its Values and professional standards.
- Maintain a strong understanding of the Society's products, services, and processes.
- Work collaboratively across the branch network, including supporting other locations where required.
- Demonstrate initiative and a proactive approach to work and team support.
- Support the Branch Manager in strengthening the Society's presence within the local community, including participation in events and networking activities where appropriate.
- Contribute to branch initiatives and help coordinate activities where required.
- Remain adaptable and open to change, supporting others through change where appropriate.

Results Orientation

- To achieve individual objectives including a branch champion role, supporting the achievement of Branch Network objectives and thereby contributing to the overall success of the society
- Collaborate with Head Office colleagues to improve overall customer experience and operational effectiveness.
- To embrace and contribute to the delivery of a commercially focused culture with your branch and team
- Make a positive contribution to your assigned champion meetings and workshops

Self-development

- Take ownership of personal development through regular one-to-ones and performance reviews.
- Complete all required training, including regulatory and mandatory learning.
- Actively seek opportunities to develop leadership skills, including communication, organisation, and coaching.
- Apply learning to improve individual performance and contribute to team 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 standard of numeracy and literacy, with the ability to communicate clearly and accurately • Basic understanding of customer service principles and delivering positive customer outcomes • Awareness of different leadership approaches and how to support and positively influence others, including through role modelling and informal coaching
Experience	• Experience of working in a customer-facing or service-focused environment • Experience of working collaboratively as part of a team to achieve shared outcomes • Experience of taking responsibility for tasks and seeing them through to completion • Experience of supporting others, sharing knowledge, or contributing to team improvements (desirable, not essential)
Skills and abilities	<i>Customer and Communication Skills</i> • Ability to build positive relationships with customers and colleagues • Clear and effective communication skills, with the ability to adapt style for different audiences • Ability to listen, understand needs, and respond appropriately <i>Teamwork and Emerging Leadership</i> • Ability to work collaboratively and contribute positively within a team environment • Ability to support and encourage colleagues, sharing knowledge and best practice where appropriate • Willingness to take initiative and contribute ideas to improve team performance and customer experience • Ability to act as a positive role model through professional behaviour and attitude • Awareness of how individual and team performance contributes to overall branch success • Ability to support others through change by maintaining a positive and adaptable approach <i>Organisation and Accountability</i> • Ability to organise and prioritise workload effectively • Takes ownership of tasks and follows through to completion • Ability to work with attention to detail and accuracy • Proactive and adaptable approach to changing priorities • Ability to apply sound judgement when making decisions within role remit, recognising when to escalate issues appropriately

Person Specification

Skills and abilities	<i>Problem Solving and Improvement</i> • Ability to identify opportunities to improve processes or ways of working • Confidence to suggest ideas and solutions in a constructive way • Willingness to learn from feedback and apply learning in practice • Ability to assess situations, identify potential issues, and contribute to practical solutions that support team and customer outcomes <i>Digital and Technical Skills</i> • Basic IT skills, including the ability to use Microsoft Word and Excel • Willingness to learn new systems and technologies relevant to the role
Personal Attributes and Behaviours	• Demonstrates a positive, professional and customer-focused approach • Shows integrity, accountability and reliability in all activities • Open to learning, feedback and continuous development • Demonstrates flexibility and adaptability in response to business needs • Values diversity and contributes to an inclusive and respectful working environment • Resilient and maintains a positive approach when dealing with challenges or change
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

