

Job Description



Job Title	Customer Assistant	
Date & Version	January 2024	Version: 4.0
Reports to:	Branch Manager	
Direct Reports:	None	
Produced by:	Head of Branch Network and Customer Support	

Job, purpose and scope

To build relationships with existing and new customers, promoting the Society's products and services. Working as part of a team to deliver exceptional customer service to meet the needs of our existing and new members.

Duties and key responsibilities

Customer Service

- Building customer relationships and growing member loyalty through the interaction and engagement with them either on a face-to-face basis, over the telephone or via video call.
- Identifying customer needs and promoting the products and services that Leek Building Society can provide, whether that be directly or by referring to specialist colleagues.
- To make use of open spaces and member zones, you will work in these areas at the direction of your Branch Manager. You will be expected to utilise your Customer Experience skills training to maximise member engagement and support the provision of exceptional customer service.
- To demonstrate flexibility in action and thinking to provide excellent customer service in line with the Society's Values.
- To carry out any tasks that have been delegated from the Branch Manager.
- To contact customers by outbound telephone calls to promote the Society's products and services.
- To process all customer requests accurately and efficiently, making sure that tills balance and all administration is processed accurately first time.
- To achieve individual objectives, supporting the achievement of Branch Network objectives and thereby contributing to the overall success of the Society.
- To work from other branches from time to time to support operational demand requirements.

Duties and key responsibilities

Risk Management and Branch Security

- To adhere to the Society's policies and procedures at all times to mitigate risk.
- To Identify and report risk events in accordance with the Risk Management Policy.
- To ensure that work is carried out accurately. Attention to detail is essential.
- To comply with all Leek Building Society policies and regulatory requirements.
- To understand the importance of a risk culture as it applies to the Customer Assistant role.

Society Ambassador

- To embrace and work in line with the Society's core values.
- To have a good understanding of the Society's products, services and processes required to carry out the role.
- To work as part of a team providing flexibility where required. This includes travelling to other locations within the business.
- To be able to work on own initiative
- To support the Branch Manager to raise the branch profile in the area by participating in networking and community events. This could include working outside the normal contracted working hours.
- To be receptive of and willing to embrace change.
- To present a professional image at all times.

Self-development

- To take ownership of your own development by actively participating in 1-2-1's and Personal Development Reviews.
- To keep up to date with training requirements including e-learning and attending training courses where required.

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	<ul style="list-style-type: none"> • Good level of numeracy and literacy <p>Regulatory Knowledge (Internal Training Provided):</p> <ul style="list-style-type: none"> • TCF/Conduct Risk • FCA Regulation – BCOBS & Senior Manager Regime/Certification Regime/Conduct Rules • Anti-Money Laundering • Data Protection Act • Equality Act / Equal Opportunities • Complaints Procedure • Health and Safety
Experience	<ul style="list-style-type: none"> • Experience of working in a customer service environment • Experience of contributing effectively working as part of a team
Skills and abilities	<ul style="list-style-type: none"> • Excellent customer service skills are essential for this role • Ability to work as part of a team is essential • Ability to identify customer needs is essential • Ability to work on own initiative demonstrate a can-do approach and be willing to learn is essential • Ability to competently use the basic functions on Microsoft Word and Excel
Other requirements	<ul style="list-style-type: none"> • Although a base branch will be allocated and this will be the usual place of work, the role holder may be asked to work at other Leek Building Society branch/office locations from time to time. • Willingness to occasionally work outside standard branch opening hours to support events in the community/branch open evenings etc. is required.

