

Role	Assistant Branch Manager
Grade	11
	Role that assists the Area or Branch Manager with leading a team(s) and also provides guidance, advice, and support.
Job Family	Sales and Marketing
Responsible to:	Area or Branch Manager
Responsible for:	Customer Advisers, as delegated by Branch or Area Manager (who will retain overall responsibility for performance)
<u>Key Contacts</u>	
Internal	Regional Manager TDM Branch Operations MSC Audit Investment Admin Customer Relations People Support People Development
External	Customers Solicitors Norwich Union DLPS
Authority Levels	<ul style="list-style-type: none"> ▪ £50,000 cheque signing mandate ▪ Authorised to sell mortgages and associated protection products under the T&C Scheme ▪ Authorised to sell wills and structured investment products

Main Purpose of the role

The role has joint accountability, but not ultimate responsibility, with the Branch Manager for the volume, quality and timeliness of end results for:

- Maintaining high standards of customer service
- Maintain Audit standards
- Follow sales process under T&C scheme
- Achieve branch targets
- Support & guidance of colleagues
- Management of staff to continue developing and improving performance
- Conduct quarterly reviews and setting of key business priorities in the BM's absence
- Maintain mortgage and associated sales within constraints of the Training and Competency scheme
- Update and maintenance of branch sales records

The post holder will help to ensure that all appropriate policies and procedures are in place and understood by all Department members and that the fair treatment of customers is central to the Society's approach in all its operations.

Key Accountabilities

Customers Love Us
<ul style="list-style-type: none"> ▪ Day to day oversight of standards, processes and procedures for: <ul style="list-style-type: none"> Customer services manual Branch security manual Castle operating system Training and Competency Scheme <p>The above should:</p> <ul style="list-style-type: none"> - integrate brand values into the Society's ethos and facilitate the fair treatment of customers; - be compliant with relevant Codes of Practice/guidance; - fully integrate with the process of other areas of the business; and <ul style="list-style-type: none"> ▪ Create, maintain and enhance working relationships with key contacts. ▪ Promote compliance of the relevant legislation, regulations and codes of practices by ensuring all your team/areas of the business use the correct control mechanisms in place; and ensuring your team/areas of the business is aware of their regulatory responsibilities and the implications if non-compliance. ▪ Ensure Health and Safety, Data Protection, prevention of financial crime, FSA requirements including Treating Customers fairly are followed within the department ▪ Responsible for organising the team and contributing to the testing in relation to an effective, properly tested Disaster Recovery Plan to ensure the Society's ongoing ability to serve customers in the event of a major interruption to business processes. ▪ Understand Society stance on situations relating to branch raid or hostage situation. ▪ Ensure appropriate monitoring checks are in place for all communication produced by the Branch team to ensure maintenance of quality standards. ▪ Responsible for the production of management information which measures the effectiveness of your team and demonstrates the fair treatment of customers.

Financially Strong
<ul style="list-style-type: none"> ▪ Work closely with the Area or Branch Manager to ensure a joined up approach in the delivery of the Branch objectives. ▪ Responsible for the allocation and monitoring of work for the Branch team to ensure: <ul style="list-style-type: none"> - the delivery of operational plans and sales objectives; and - the maintenance of service standards whilst balancing customer expectations and operational constraints. ▪ Ensure that your branch colleagues have a clear plan, commitment and ownership of targets, KBP's indicators and measures. ▪ Seek to continually improve processes and systems for sales and management, with an emphasis upon business service levels, productivity, efficiency optimisation, customer service focus and the long-term benefits for the Society. ▪ Working with the Area or Branch Manager, input into the setting of annual budgets for your teams and be responsible for controlling expenditure in relation to them.

Responsible for prompt and timely response to requests for information from the Branch Manager, Regional Manager or TDM

- Assist with the timely and accurate submissions of:
 - Monthly audit checks
 - Monthly and quarterly KBP reviews with Customer Advisers

Great Place to Work

- Promote our vision of FAMOUS by demonstrating the Society's values and behaviours at all times.
- Responsible for ensuring that the Branch team is resourced and that there is a clear allocation of responsibilities which optimises the delivery of branch performance.
- Ensure the occurrence of regular and timely team talks within your team ensuring alignment with the requirements of FAMOUS.
- Ensure effective performance management; setting SMART KBPs and behaviour expectations, coaching and regularly reviewing progress against KBPs for your Supervisor team and that it is taking place where appropriate within your teams.
- Working with the Branch Manager into the succession planning for your teams to support any potential growth and also mitigate any potential risks associated turnover; ensuring that personal development plans take account of medium term career advancement.
- Ensure appropriate adherence to all Group policies and procedures at all times.
- Responsible for ensuring the Learning and Development requirements of your teams are identified and acted upon to enhance performance and ensure resource is deployed effectively.
- Responsible for ensuring training is delivered and evidenced for relevant legislation and regulations including Health and Safety, Data Protection, prevention of Financial Crime, FSA requirements and treating customers fairly for your teams.
- Pro-actively take ownership of own development needs.

Person Specification

Leading through people

- Experience of managing situations where the interpretation and communication of highly complex and/or sensitive information is required.
- A proven ability to develop and maintain effective working relationships in order to support the achievement of working objectives.
- Demonstrates use of appropriate/differing leadership styles responsive to the requirements of the situation in order to achieve a desired outcome.
- Evidence of delegating and providing support within a team.

Leading by results

- Proven experience of actively updating skills and knowledge in the financial and mortgage related industry to support with attainment of work related and personal objectives.
- A proven track record of achievement of results, including attainment of:
CeMAP
- Ability to independently apply work experience and/or extensive knowledge base of mortgage and protection related areas in providing solutions, guiding and directing others and also contributing and taking responsibility for the definition of policies/procedures and processes.
- An up to date knowledge and understanding of the impact of Financial Services regulation on the branch.
- Experience of identifying business needs and setting operational/resource plans through the application of acquired technical experience and organisational skills.
- Proven experience in controlling and managing resource to ensure operational plans are achieved.
- Experience of successfully identifying and implementing process and business related improvements; through an underpinning knowledge of the principles and concepts of process improvement.

Leading by example

- A proven track record of delivering results by leading teams in a sales and management environment.
- A significant amount of experience in professional leadership which includes setting the standards around which others will operate including KBPs, coaching, review of performance relative to KBP's and determination of reward outcomes.
- A proven ability to effectively communicate both verbal and written to direct/influence and persuade others at all management levels.
- Evidence of adapting different styles of communication in situations in order to contribute to the successful achievement of objectives.
- Evidence of actively developing self.