

## Customer Adviser/Customer Review Adviser/Senior Customer Adviser

<b>Department:</b>	Branch Network	<b>Function:</b>	Distribution
<b>Grade:</b>	7T/8T/9T	<b>Direct reports:</b>	None
<b>Reports to:</b>	Branch Manager/Senior Branch Manager	<b>Location:</b>	Branch Network
<b>Purpose:</b> The role has responsibility for the accuracy of tasks performed in relation to:- Maintaining high standards of customer service, till accuracy, following sales process to achieve agreed sales targets across all business areas. The post holder will ensure that the fair treatment of customers is central to the Society's approach in the completion of above.			

<b>Key Accountabilities:</b>	<b>Key Outputs</b>
<p><b>Customer Advisers</b></p> <ul style="list-style-type: none"> <li>• Ensure you follow all relevant internal procedures to support the management of Operational Risk.</li> <li>• Understand branch business plan and work towards this as guided by branch manager</li> <li>• Ensure quality of outputs by ensuring all work is error free</li> <li>• Actively contribute to your individual objectives and provide feedback on a regular basis</li> <li>• Excellence of service delivery to customers and/or Stakeholders, including effective face to face interaction and recognising and maximising business opportunities</li> <li>• Ensure you work within the TCF principles and that this is the forefront of everything you do</li> </ul> <p><b>Customer Advisers competent in one product area</b></p> <ul style="list-style-type: none"> <li>• Ensure you achieve and maintain competency in relevant sales areas to ensure performance levels at all times</li> <li>• Maintain sales outputs to required level as set by line manager</li> </ul> <p><b>Customer Review Advisers – as Customer Adviser plus</b></p> <ul style="list-style-type: none"> <li>• Ensure you achieve and maintain competency in three sales areas to ensure performance levels at all times</li> <li>• Develop effective customer relationships</li> </ul>	<ul style="list-style-type: none"> <li>• All relevant internal procedures are following and understanding of operational risks relevant to your area is shown</li> <li>• Work to individual lead generation targets and ensure you meet the targets as set by your line manager</li> <li>• Till management, observations and file quality within set standards</li> <li>• Achievement of targets set and active contribution in 1-2-1's and reviews</li> <li>• Feedback from customers and mystery shop scores, and number of complaints within set standards</li> <li>• Understanding of TCF principles demonstrated</li>   <li>• Effective competence maintained through T&amp;C Scheme and performance guidelines</li> <li>• Lead generation stats, updates on telesales lists</li>   <li>• Effective competence maintained through T&amp;C Scheme and performance guidelines</li> </ul>

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<p><b>Person Specification – Customer Adviser/Customer Review Adviser</b></p>	
<p><u>Essential</u> <b>Skills/Knowledge/Experience</b></p> <ul style="list-style-type: none"> <li>• Evidence of effective listening skills in the interpretation of customer requests.</li> <li>• Experience of planning and organising own work to ensure a focus on priorities.</li> <li>• Evidence of regular and effective use of communication skills both verbal and written.</li> <li>• Evidence of demonstrating the provision of excellent customer service.</li> <li>• Proven experience of actively updating skills and knowledge to support with attainment of work related objectives.</li> <li>• A proven track record of achievement of results within a sales environment</li> <li>• Evidence of making decisions through the selection of the most appropriate existing solution by relating and applying previous work experience knowledge.</li> </ul>	<p><u>Desirable</u> <b>Skills/Knowledge/Experience</b></p> <ul style="list-style-type: none"> <li>• Previous experience working within Financial Services environment</li> </ul>
<p><b>Person Specification – Senior Customer Adviser</b></p>	
<p><u>Essential</u> <b>Skills/Knowledge/Experience</b></p> <ul style="list-style-type: none"> <li>• A proven ability to develop and maintain effective working relationships in</li> </ul>	<p><u>Desirable</u> <b>Skills/Knowledge/Experience</b></p> <ul style="list-style-type: none"> <li>• Experience of leadership and performance management, including evidence</li> </ul>

<p>order to support the achievement of working objectives.</p> <ul style="list-style-type: none"><li>• Evidence of supporting colleagues through buddying, coaching or training of other team members</li></ul>	<p>of coaching, training, conducting 1-2-1's, observations</p>
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