

<b>Role</b>	Customer Adviser Level 4
<b>Grade</b>	10T
	Professionals that are required to: apply knowledge, research and analyse information when making decisions. Will work independently with little supervision.
<b>Job Family</b>	Sales and Marketing
<b>Responsible to:</b>	Branch Manager
<b>Responsible for:</b>	None
<b><u>Key Contacts</u></b>	
<b>Internal</b>	Regional Manager Branch Operations TDM Investment Admin MSC Customer Relations Audit
<b>External</b>	Members and potential member to the Society Solicitors DLPS Norwich Union
<b>Authority Levels</b>	<ul style="list-style-type: none"> <li>▪ £25,000 cheque signing mandate</li> <li>▪ Authorised to sell wills and authorised structured investment products</li> <li>▪ Authorised to sell the Societies mortgages and associated protection products</li> </ul>

There is an excellent bonus scheme in operation.

At Level 2, Customer Advisers have the opportunity of applying to join the 'Fame Academy' (a management training program). They then have the opportunity to move to Level 4 and then on to a Branch Manager role.

## Main Purpose of the role

The role is has responsibility for the quality of tasks performed and service provided in:

- Maintaining high standards of customer service
- Till accuracy
- Follow sales process to achieve agreed sales targets across all business areas
- Support & guidance of colleagues
- Maintain mortgage and associated sales within constraints of the Training and Competency scheme
- Update and maintain branch sales records

The post holder will ensure that the fair treatment of customers is central to the Society's approach in the completion of above.

## Key Accountabilities

### Customers Love Us

- Responsible for comprehensive understanding, adherence and contribution towards the on-going development of standards, processes and procedures for:
  - Customer services manual
  - Branch security manual
  - Castle operating system
  - Training and Competency Scheme

The above should:

- integrate brand values into the Society's ethos and facilitate the fair treatment of customers;
  - be compliant with relevant Codes of Practice/guidance; and
  - fully integrate with the process of other areas of the business.
- 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.
  - Understand the content of Disaster recovery plan which ensures the Society's ongoing ability to serve customers in the event of a major interruption to business processes and participate in testing in relation to this plan when required to.
  - Understand Society stance on situations relating to branch raid or hostage situation.
  - Ensure all communication is delivered in conjunction with the Society's style guide and department procedures.

### Financially Strong

- Work closely with the Branch Manager to ensure that appropriate actions are identified and delivered in the branch plan.
- Responsible for completing work/project tasks including:
  - actions/objectives identified by your Manager from the branch network plan;
  - maintain level 3 competency standards;
  - achieve a minimum of 4 greens against branch famous future targets
  - ensuring till management and accuracy standards are met;
  - following Society's sales process at every opportunity;
  - ensure Society conversion standards are met;
  - achieve Society's minimum standards of attendance from all booked appointments;
  - achieve agreed sales targets;
  - complete required number of observations under T&C scheme;
  - achieve 1 level 3 competent will writing observation;
  - achieve a pass on structured investment product test;
  - evidence of buddying and supporting a colleague;

- evidence of supervisory duties;
  - evidence the effective running of 2 early morning training sessions to a competent standard;
  - perform delegated audit tasks to a competent standard;
  - achieve full CII Certificate in Mortgage Advice or Cemap
  - achieve Registered Mortgage Adviser sign off under the T&C Scheme
- Responsible for maintaining service standards in completion of tasks for the branch ensuring this is done balancing customer expectations and operational constraints.
- Manage and prioritise own workload; taking into account your KBP's, ensuring productivity is optimised and an appropriate balance is taken between quality of service and volume.
- Seek to continually improve processes and systems for the branch, with an emphasis upon business service levels, productivity, efficiency optimisation, customer service focus and the long-term benefits for the Society.
- Promote awareness of financial implications within the branch team, and take into consideration when making decisions.
- Working with the Branch Manager in the identification and solution of operational risks in relation to the delivery of solutions for the business.
- Responsible for the production of Management information for the Branch team and feedback to the Branch Manager/Regional Manager, or other business areas where appropriate. This should include:
    - Completed 'Your Famous Future' forms
    - Ensure completion of branch activity registers in an accurate and timely manner.
    - Evidence on the branch statistics that sales targets have been achieved.
- Responsible for the timely and accurate submissions of:
    - requests for information from TDM, branch or Regional Manager.
- Provide expertise and advise that aligns with and supports the business objectives in relation to Society's products and services. Responsible for sharing your expertise in relation to Society's products and services with the team by providing support, guidance and training.

#### Great Place to Work

- Promote our vision of FAMOUS by demonstrating the Society's values and behaviours at all times.
- Ensure proactive contribution towards team talks taking into account the requirements of FAMOUS.
- Ensure appropriate adherence to all Group policies and procedures at all times.
- Provide support, guidance and specific job related to team members as required.
- Ensure you keep up to date with the training requirements for relevant legislation and regulations including Health and Safety, Data Protection, prevention of Financial Crime, FSA requirements and treating customers fairly and make sure it is evidenced.
- Pro-actively take ownership of own development needs.

#### Working Smarter

**ENTHUSIASM**

**FAIRNESS**

**OWNERSHIP**

**TRUST**

- Take ownership and responsibility for achieving targets and KBP's set by Branch Manager
- Follow customer service and security procedures in a timely and effective manner to ensure accuracy
- Display initiative by challenging current processes and procedures and providing new effective ideas
- Ensure all customer service standards are exceeded
- Display high organisational skills and initiative in the absence of assistant / branch manager
- Ensure management information (BAR) is updated in a timely manner in absence of assistant / branch manager.

mutual**matters**



**PERSON SPECIFICATION**

Leading through people
<ul style="list-style-type: none"> <li>▪ A proven ability to effectively communicate both verbal and written to direct/influence and persuade others at an appropriate level.</li> <li>▪ Experience of independently interpreting and communicating more complex and/or sensitive information in less straight forward situations.</li> <li>▪ Ability to develop and maintain effective working relationships both within the team and the wider business in order to support the attainment of objectives.</li> <li>▪ Evidence of supporting team members through on the job training and/or coaching and also by sharing knowledge and expertise.</li> </ul>
Leading by results
<ul style="list-style-type: none"> <li>▪ Proven experience of actively updating skills and knowledge in financial and mortgage related industry to support with attainment of work related and personal objectives.</li> <li>▪ A proven track record of achievement of results, including attainment of: CII Certificate in Mortgage Advice or Cemap</li> <li>▪ Ability to independently apply work experience and/or extensive knowledge base of mortgage and protection related business areas in providing solutions to the business.</li> <li>▪ An up to date knowledge and understanding of the impact of Financial Services regulation.</li> <li>▪ Experience of planning and prioritising own and others workloads to support the achievement of departmental objectives.</li> <li>▪ Ability to analyse management information to provide solutions and resolve complex problems.</li> <li>▪ Experience of successfully identifying and implementing process and business related improvements; through knowledge of the procedures.</li> </ul>
Leading by example
<ul style="list-style-type: none"> <li>▪ Experience in leadership which includes planning KBPs, coaching, review of performance relative to KBP's and recommendation of reward outcomes.</li> <li>▪ Evidence of managing own personal development.</li> </ul>