

# Cambridge Building Society

<b>Job/Role Grade:</b>
------------------------

## JOB DESCRIPTION

01 Mar. 10

<b>Job Title :</b>	Customer Contact Centre Assistant		<b>Job Code :</b>	
<b>Division :</b>	Sales & Marketing	<b>Department :</b>	Customer Contact Centre	<b>Location :</b> Administration Centre
<b>Accountable To :</b>	Customer Contact Centre Manager		<b>Direct Reports :</b>	nil
<b>Team Size :</b>	9	<b>Geographic Working Area :</b>	Administration Centre	
<b>Peers (Own Dept.) :</b>		<b>Peers (Other Dept's.) :</b>		
<b>Budget Responsibility :</b>	£ nil	<b>Describe Budget Responsibility :</b>	n/a	
<b>Job Purpose :</b>	<p>To provide a market leading customer telephony service to new and current customers &amp; members. Delivery of business areas sales targets.</p> <p>To provide telephony/packing support to the Intermediary Sales Team as directed by ISM/CCCM</p>			

**Key Result areas :**

<p><b>What are the Key Outputs of the Job? (What results do you leave behind)</b></p>	<p><b>What are the Success Measures of your Job? (How will we know if you have done your job well)</b></p>	<p><b>What are the main Tasks that you do in your job? (What Skills are you required to have)</b></p>	<p><b>What are the main Decisions that you have to take in your Job?</b></p>
<p><b><u>1. Sales</u></b></p> <p>Contribute towards the growth and sustainability of the Society through the achievement of appropriate sales targets through telephony channel</p>	<ol style="list-style-type: none"> <li>1. Substantive Mortgage leads generated</li> <li>2. Investment targets met</li> <li>3. Third Party Sales               <ol style="list-style-type: none"> <li>a. Heaths</li> <li>b. L &amp; G</li> <li>c. JRS</li> <li>d. Travelex</li> <li>e. Credit Suisse</li> </ol> </li> <li>4. Fact Finds, Lead Slips, Work Requests quality completion.</li> </ol>	<ol style="list-style-type: none"> <li>1. Plan &amp; prioritise personal sales activities and customer/prospect contact towards achieving agreed business aims.</li> <li>2. Manage personal time to full effectiveness.</li> <li>3. Quality fact finding during all appropriate calls “Smile”</li> <li>4. Full usage of customer prompts, marketing lists, savings retention activities.</li> <li>5. Selling full range of CBS Products &amp; Services.</li> <li>6. Closing inbound &amp; outbound sales enquiries.</li> <li>7. Fully support all marketing activities – sales &amp; recording</li> <li>8. Promote benefits of membership of the Society</li> <li>9. Lead spotting and appropriate Customer Appointment booking.</li> </ol>	<ol style="list-style-type: none"> <li>1. Do actions comply with CBS guidelines &amp; FSA regulations</li> </ol>

<p><b><u>2. Customer Service</u></b></p> <p>Provide a market leading telephonic customer service –</p>	<ol style="list-style-type: none"> <li>1. Customer satisfaction score</li> <li>2. No substantive adverse internal feedback.</li> <li>3. Achieve a minimum call quality of 3 standard</li> </ol>	<ol style="list-style-type: none"> <li>1. Adherence to all telephony SLAs</li> <li>2. Dealing with customer account queries accurately</li> <li>3. Minimum telephony standards applied at all times. “Welcome”</li> <li>4. Appropriate &amp; timely hand over of work requests.</li> <li>5. Respond to and follow up service &amp; sales enquiries promptly.</li> <li>6. Finding solutions to customer problems and queries and resolving as appropriate.</li> </ol>	<ol style="list-style-type: none"> <li>1. Ensure in line with internal service standards</li> </ol>
<p><b><u>3. Account Administration</u></b></p> <p>Ensure effective &amp; efficient after-sales service to ensure the retention of members / customers</p>	<ol style="list-style-type: none"> <li>1. No valid customer complaints</li> <li>2. Queries dealt with within specified timeframes</li> <li>3. Accuracy of correspondence</li> <li>4. Follow ups always carried out where applicable</li> </ol>	<ol style="list-style-type: none"> <li>1. Timely follow through of all customer enquiries</li> <li>2. Follow-up on customer discussions (email / phone calls / letters to customers)</li> <li>3. Effective hand over of admin.</li> <li>4. Full adherence of all SLA agreed.</li> </ol>	<ol style="list-style-type: none"> <li>1. Priority of work</li> </ol>
<p><b><u>4. Retention</u></b></p> <p>Contributing to the sustainability &amp; reputation of the Society through the retention of members</p>	<ol style="list-style-type: none"> <li>1. Support all work activities towards assisting with 90% mortgage retention</li> <li>2. Savings retention 80%</li> </ol>	<ol style="list-style-type: none"> <li>1. Route 66</li> <li>2. Broker liaison – when required</li> <li>3. Ownership of product maturities, telephone queries, and sales</li> </ol>	<ol style="list-style-type: none"> <li>2. Advise &amp; appropriate hand over to product specialists</li> </ol>
<p><b><u>5. General Branch Administration</u></b></p> <p>Ensure that the office is a suitable and proper work environment to enable administration &amp; telephone support to customers</p>	<ol style="list-style-type: none"> <li>1. Compliance with Health &amp; Safety requirements</li> <li>2. Compliance with Security standards</li> <li>3. Audit results</li> </ol>	<ol style="list-style-type: none"> <li>1. Ensure physical appearance of the work area conforms to CBS standards</li> <li>2. All Regulatory activities are completed within timescales set.</li> </ol>	<ol style="list-style-type: none"> <li>1. Do actions comply with CBS procedure</li> </ol>

<p><b><u>6. Community</u></b></p> <p>Promote the image of the Society through active participation in local community events</p>	<ol style="list-style-type: none"> <li>1. No. of events</li> <li>2. Effectiveness of events – exposure of CBS</li> <li>3. Agreed days per month spent on networking in the community</li> </ol>	<ol style="list-style-type: none"> <li>1. Identifying appropriate community involvement activities</li> <li>2. Participation in community events</li> <li>3. Promotion of Society &amp; CBS values</li> <li>4. Networking in the local community to introduce the services offered by the CBS</li> </ol>	<ol style="list-style-type: none"> <li>1. Appropriateness of events &amp; participation</li> </ol>

## Person Specification :

Requirement	Essential	Desirable
<b>1. Education</b>	<ol style="list-style-type: none"> <li>1. 4 GCSEs with maths and English</li> </ol>	<ol style="list-style-type: none"> <li>1. NVQ Level 3 Customer Service</li> <li>2. NVQ Level 3 Financial Service</li> </ol>
<b>2. Experience</b>	<ol style="list-style-type: none"> <li>1. Customer Service experience in a busy environment</li> <li>2. Direct Sales Experience</li> </ol>	<ol style="list-style-type: none"> <li>1. Experience in financial / Banking services</li> <li>2. Underwriting</li> <li>3. Tele-sales experience</li> </ol>
<b>3. Knowledge</b>	<ol style="list-style-type: none"> <li>1. Banking Code</li> <li>2. Basic knowledge of FSA Regulations</li> <li>3. MS Word</li> <li>4. MS Excel</li> <li>5. CBS Products and services</li> </ol>	<ol style="list-style-type: none"> <li>1. Building Society</li> <li>2. Mutuality</li> <li>3. CBS Systems</li> </ol>
<b>4. Skills</b>	<ol style="list-style-type: none"> <li>1. Able to operate independently</li> <li>2. Selling</li> <li>3. Analysing</li> <li>4. Influencing</li> <li>5. Risk analysis</li> <li>6. Verbal &amp; written communication</li> <li>7. Listening</li> <li>8. Interviewing techniques</li> <li>9. Time Management</li> <li>10. Keyboard skills</li> </ol>	