

Cambridge Building Society

Job/Role Grade:

2

JOB DESCRIPTION

01 Mar. 10

Job Title :	Branch Assistant			Job Code :	
Division :	Sales & Marketing	Department :	Branch Network	Location :	Branch Network
Accountable To :	Branch Supervisor or Branch Manager		Direct Reports :	None	
Team Size :	3 – 6		Geographic Working Area :	Individual Branch / Mobile within cluster	
Peers (Own Dept.) :	None		Peers (Other Dept's.) :	Membership Services Assistant/Finance Assistant	
Budget Responsibility :	£ nil	Describe Budget Responsibility :	n/a		
Job Purpose :	To provide customers with market leading service through matching the Society's products with the needs of the member / customer				

Key Result areas :

<p>What are the Key Outputs of the Job? (What results do you leave behind)</p>	<p>What are the Success Measures of your Job? (How will we know if you have done your job well)</p>	<p>What are the main Tasks that you do in your job? (What Skills are you required to have)</p>	<p>What are the main Decisions that you have to take in your Job?</p>
<p><u>1. General Branch Administration</u></p> <p>Ensure that the branch is attractive , tidy, comfortable and presentable to customers at all times</p>	<ol style="list-style-type: none"> 1. Compliance with Health & safety requirements 2. Compliance with Security standards 3. Branch Compliance Audit results 4. Security procedures adhered to 	<ol style="list-style-type: none"> 1. Assist with opening / closing of branch 2. Comply with normal CBS security procedures 3. Ensure physical appearance of the branch conforms to CBS standards (cleanliness, posters & displays, pamphlets, furniture, etc) 	<ol style="list-style-type: none"> 1. Do actions comply with CBS procedure
<p><u>2. Service (Normal Transactions)</u></p> <p>To provide customers with a market leading service through matching the Society's products with the needs of the member / customer</p>	<ol style="list-style-type: none"> 1. Customer satisfaction 2. No valid customer complaints 3. Daily reconciliation of cash 4. Reconciliation of Security items 5. No mistakes on customer accounts 6. All 'paperwork' (including online systems) completed in full & accurately 	<ol style="list-style-type: none"> 1. Setting up of till point (cash, security items, equipment, documents, pamphlets, etc) 2. Processing deposits & withdrawals 3. Dealing with account enquiries 4. Opening of new accounts 5. Account maintenance (changes to details, account closures, etc) 6. Educate customers as to CBS services & Products 7. Analyse customer needs 8. Advise customers of benefits and features on various products 	<ol style="list-style-type: none"> 1. Ensure that transactional requests adhere to Society rules & to FSA regulations 2. Validity of identity documents presented 3. What type of advice can be given 4. What advice to give based on product knowledge and customer requirements
<p><u>3. Sales</u></p> <p>Contribute towards the growth and sustainability of the Society through the achievement of appropriate sales targets</p>	<ol style="list-style-type: none"> 1. Mortgage lead targets achieved 2. Savings leads / sales targets achieved 3. Third Party Sales targets achieved <ul style="list-style-type: none"> - Heaths - L & G - JRS - TravelEx - Credit Suisse 	<ol style="list-style-type: none"> 1. Use conversational style to generate understanding of customer's needs 2. Apply Product knowledge to customer's needs 3. Promote benefits of membership of the Society 4. If applicable, convert query into sale 5. Refer requests for information & 	<ol style="list-style-type: none"> 1. Do actions comply with CBS guidelines & FSA regulations 2. When to pursue a 'sales' line of questioning 3. When to move customer to private area

		<p>advice to appropriate person (RMA, 3rd Party, etc)</p> <ol style="list-style-type: none"> 6. Make use of Branch Prompt & other appropriate systems to understand customer & previous discussions 7. Complete Customer Contact forms fully & accurately 	
<p><u>4. Account Administration</u></p> <p>Ensure effective & efficient after-sales service to ensure the retention of members / customers</p>	<ol style="list-style-type: none"> 1. No valid customer complaints 2. Queries dealt with within specified timeframes (service charter) 3. Accuracy and appropriateness of correspondence 4. Data protection & confidentiality rules adhered to 	<ol style="list-style-type: none"> 1. Timely follow through with all customer enquiries 2. Follow-up on customer discussions (email / phone calls / letters to customers) in line with internal service standards 3. Draft & send correspondence to account holders regarding account issues (e.g. child accounts being converted) 	<ol style="list-style-type: none"> 1. Priority of work
<p><u>5. Community</u></p> <p>Promote the image of the Society through active participation in local community events</p>	<ol style="list-style-type: none"> 1. No. of events 2. Effectiveness of events – exposure of CBS 	<ol style="list-style-type: none"> 1. Assist in identifying appropriate community involvement activities 2. Participation in community events 3. Promotion of Society & CBS values 4. Be an ambassador for CBS 	<ol style="list-style-type: none"> 1. Appropriateness of events & participation

Person Specification :

Requirement	Essential	Desirable
1. Education	<ol style="list-style-type: none">1. Normally minimum of 4 GCSE passes Grade C or above including Maths and English	<ol style="list-style-type: none">1. CFSP2. NVQ Level 2 Customer Service3. NVQ Level 2 Financial Services
2. Experience	<ol style="list-style-type: none">1. Some Customer Service experience in a busy environment2. Some Administration experience	<ol style="list-style-type: none">1. Financial Service Experience2. Sales
3. Knowledge	<ol style="list-style-type: none">1. Windows2. MS Word	<ol style="list-style-type: none">1. Banking Code2. FSA Regulations3. MS Excel
4. Skills	<ol style="list-style-type: none">1. Oral Communication2. Written Communication3. Keyboard skills4. Time Management5. Influencing6. Listening	<ol style="list-style-type: none">1. Cash handling