

Job Title	Customer Representative – Saturday plus potential holiday cover
Reporting to	Branch Manager

Main purpose of the role

The Customer Representative (CR) is responsible for delivering the highest standards of customer service whilst ensuring that our Members are aware of all products and services provided by the Society enabling them to make an informed choice.

This particular role is to cover branch operations on a Saturday morning, on the first and third Saturday of every month. There will also be the opportunity for some additional hours to cover branch staff holidays, if the timings fit around other commitments you may have.

The role would suit an individual who potentially already has a further part/ full time role elsewhere and would like some additional hours or an individual in school or higher education who is available at weekend and in holiday periods.

No previous experience is necessary as full on the job training will be provided.

Main duties and responsibilities – Role Specific

- Cashier duties including posting transactions, till security and balancing.
- Updating of member records to ensure we have up to date contact details and preferences.
- Responding to enquiries from existing or potential members as to savings account options, current interest rates and wider savings queries as presented.
- Registering deaths, adding third parties and POA's, changing address', names and genders
- General administration duties as and when required ranging from registration of deaths, third party and POA additions, changes to contact details, maturity of accounts, etc.
- Supporting any branch based campaigns for promotion of savings products in the Society

Main duties and responsibilities - General

- **Represent the Society**, with a comprehensive understanding of our products and services.
- Commitment to **excellent customer service**
- **Operate compliantly** within the principles of regulation laid down by the Prudential Regulation Authority (PRA) and the Financial Conduct Authority (FCA)
- **Be responsible for your own quality of output** – attention to detail and a concern for accuracy is essential.
- **Take responsibility for your own development** through the 1 to 1, appraisal and personal development process and ensuring all training requirements are completed to timescales
- **Maintain and develop understanding of the functionality of the Society's core banking systems**, supporting and being an advocate for change and efficiency within all teams.
- Ensuring **good customer outcomes**

Skills/Expertise – Role Specific (desirable but not essential)
<ul style="list-style-type: none"> • Experience of cash handling • Experience of working with customers delivering exceptional service • The ability to empathise with different customer situations including vulnerable customers • Strong attention to detail with a good level of numeracy to conduct accurate cash transactions • Resilient and able to handle challenging customer situations • A passion and drive to achieve good customer outcomes • Positive attitude

Skills/Expertise – General
<ul style="list-style-type: none"> • Excellent communications skills both written and verbal. • Ability to work as part of a team. • Ability to work without supervision, in an orderly manner, delivering quality, accurate output. • Excellent time management and organisational skills – ability to plan, prioritise and organise tasks. • Ability to resolve problems efficiently. • Demonstrates initiative. • Embrace the Society's values and demonstrate these in all aspects of the role. • A strong knowledge of various IT packages including Excel and Word. • Good working knowledge of all the Societies policies and procedures, particularly compliance with AML, financial crime, GDPR and identification requirements • Positive attitude • Ability to work in a challenging and demanding environment

Legal responsibilities and policies
<ul style="list-style-type: none"> • To adhere to the Society's Employment Policies and Procedures, including the Society's Health & Safety Policy and any other policy that may be in force from time to time. • To buy in to the Society's ethos and understand the broader interests of the Society's business. • To undergo appropriate training as required by the Society. • To understand, maintain and promote the workplace ethos at all times whilst undertaking your duties and responsibilities. • Knowledge and understanding of the FCA Conduct Rules to ensure adherence at all times in all aspects of own job role.

Behaviours
<ul style="list-style-type: none"> • Embrace the Society's values and demonstrate these in all aspects of the role. • Demonstrate a willingness to help others and other departments in times of increased workloads. • Display and promote accountability and responsibility. • Remain professional and courteous to members, visitors and staff at all times.

It is the intention of Penrith Building Society that this Role Profile is seen as a guide to the major areas and duties for which the role holder is accountable. However, the business may change, and the role holder's obligations may vary and develop. This Role Profile should therefore be seen as a guide and not as a permanent, definitive and exhaustive statement.