

Job Title	Operations Assistant – Available with an Apprenticeship option
Reporting to	Operations Manager

Main purpose of the role

The Operations Assistant works within the Operations Team to support the wider business with operational business as usual, testing and project delivery. Maintenance of high levels of customer service ensuring good customer outcomes.

Support the business' drive for efficiency, exemplary service and operational resilience.

Post holder will have day to day responsibility for the delivery of mortgage and savings BAU.

Post holder will be supported in obtaining relevant financial services qualifications.

Main duties and responsibilities – Role Specific

- Provide day to day member and account servicing support
- Mortgage retentions support Operations Manager
- General loan account servicing
- Digital channel administration and member request processing
- Maturity processing (savers and loans)
- General savers account servicing
- Data input and amendment
- Payment processing (direct debit, standing orders)
- Audit and data quality checks (FLOD)

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 Ensuring all training requirements are completed to timescales (for example Skillcast)
- **Maintain and develop understanding of the functionality of the Society's Core systems**, supporting and being an advocate for change and efficiency within all teams.
- Ensuring **good customer outcomes**

Skills/Expertise – Role Specific

- Excellent customer service ensuring good customer outcomes
- Demonstrating initiative
- Time management & organisational skills
- Risk identification & mitigation
- Support regression & product testing

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

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.