



THE CAMBRIDGE BUILDING SOCIETY

Customer Engagement Adviser

KEY INFORMATION

Reports to: Customer Engagement Team Leader

Grade: 5

PURPOSE

To provide excellent customer service with the objective that the customer will recognise and recommend the service provided whilst contributing to our business objectives. Key contact point for all customer enquiries providing face-to-face service to the Society's customers.

CRITICAL SUCCESS FACTORS

Customer: Provide excellent customer service every time

People: Be part of an energised team environment that delivers high service and engagement levels

Brand: Be an advocate of the Society's brand through all customer interactions

Resilience: Have a clear understanding of the compliance framework and how to deliver excellent results

Financial: Contribute towards the growth and sustainability of the Society through achievement of business objectives

BEHAVIOURS

- Pro-Active Self-starter
- Interest to learn and develop a knowledge of products and services
- Excellent written communications
- Positive and Business Outcome focussed
- Excellent Customer Service
- Team Player
- Attention to detail

QUALIFICATIONS & ACCREDITATIONS

- Minimum of 4 GCSE passes (or equivalent) Grade C or above including Maths and English – Essential

Main Duties Within Role

- Provide friendly and efficient counter service to customers processing account transactions and other account-related requests
- Be able to explain terms & conditions of our products to customers and open new accounts appropriate to customer needs
- Ensure all customer information, account details and transactions are processed correctly
- Effective communication with other departments and partners (e.g. when dealing with account maturities or online accounts) to ensure smooth customer journey
- Ensure all written and oral communication is clear, easy to understand and complies with our Brand Voice standards and style
- Hold proactive conversations with customers to inform them of our current products and services. Apply product knowledge to customer needs
- Develop and expand own knowledge of Society products, services and processes through keeping up-to-date with changes, weekly CSSP sessions and self-study
- Complete weekly and 4-weekly branch compliance checks following specified guidelines
- Comply with all cash management procedures
- Adhere to all regulatory requirements (Money Laundering, Data Protection etc.). Complete on-line regulatory courses within defined timescales
- Promote the image of the Society through active participation in community events
- Ensure physical appearance of the branch conforms to the Cambridge standards and is a welcoming place for our customers
- Comply with Society security procedures, including branch entry procedures
- Comply with Health & Safety requirements

Skills

- IT skills
- Good communication skills
- Attention to detail
- Customer service experience
- Demonstrates accuracy
- Time management
- Cash handling
- Organisational skills

Job Holder Signature