

**THE MANSFIELD BUILDING SOCIETY
JOB DESCRIPTION**

Job Title	Branch Customer Advisor
Department	Branches
Job Number	B10-B18 B20-B28
Purpose of Job	<ul style="list-style-type: none"> • Customer Services - provide an excellent standard of customer service to meet the Society standards and objectives. • Sales - to contribute to the achievement of work based objectives, standards and sales targets as set by the Branch Manager and/or Sales & Marketing Manager. • Promotions – work together with members of the wider team particularly the Senior Sales Advisor, members of the Sales Team, Branch Managers, Sales & Marketing Manager and the Business Development Manager on internal and external promotions of products and services. • Training & Development – be responsible for ensuring that the training you receive, in conjunction with your own personal development plan, is adequate and sufficient to enable you to carry out your duties. • Counter Duties – accurately process and administer all aspects of customer accounts and deal promptly with correspondence arising out of such administration duties.
Responsible to	Senior Sales Advisor / Branch Manager
MAIN DUTIES	
Operations	<p>To provide a high standard and quality of customer service. This should include:</p> <ul style="list-style-type: none"> • Active and positive promotion of the Society, its products and services (including products offered in association with various partners) to the customers and other external business contacts. • Selling the Society products and services (including products offered in association with various partners) to match customer needs. • High quality administration and processing of customer accounts. <p>Treating customers fairly and providing information that is fair, clear and not misleading.</p>
	<p>To identify and maximise on opportunities for the sale of the Society products and services.</p> <p>To actively sell Society products and services (including those products and services offered in association with various partners) to meet the needs and requirements of the customers.</p>

	<p>Outbound calling external business contacts with products and initiatives when required.</p> <p>Assisting Intermediaries and other external contacts with telephone enquiries when required.</p> <p>To work as part of a team to achieve individual and branch targets for sales and standards of administration.</p>
	<p>To actively promote the Society, its products and service to customers and other external business contacts.</p> <p>To work with the team on the internal and external promotions of Society products and service.</p>
	<p>To ensure you provide information and advice on all Society products and sell such products to meet the needs and requirements of the customer.</p>
	<p>To carry out administration duties as required to ensure the smooth and efficient operation of the branch. These duties will include:</p> <ul style="list-style-type: none"> • Open/close office and retention of secure keys. • Maintain a cash float securely and be responsible for reconciling and banking of cash at the branch on a daily basis. <p>Maintain a secure environment by adhering to health and safety requirements.</p>
	<p>To carry out switchboard, reception and postal duties when required.</p>
General	<p>To carry out all duties as detailed and in accordance with documented policies and procedures</p> <p>To ensure you are aware of and understand your statutory obligations regarding the anti money laundering policy and procedures.</p> <p>To prepare and collate management information in accordance with laid down procedures and standards</p> <p>To ensure all targets/objectives as laid down are achieved.</p> <p>To promote the interests of and ensure adherence to the policies of the Society.</p> <p>To carry out all duties taking into account the FCA's Conduct Risk requirements and the principles of Treating Customers Fairly.</p> <p>To undertake other duties as may be required in the post and department detailed above or any other post in any department or branch of the Society.</p>
<p>This job description will be amended in consultation to reflect changes in or to the job.</p>	
<p>Date:</p>	<p>Agreed:</p>