

ROLE PROFILE

Role Title:	Contact Handler	Reports to(Title):	Team Leader
Direct reports (Titles):	n/a	Department:	Contact Centre

Role Purpose

To provide a service to inbound customer contacts through multiple communication channels, primarily by telephone and email, and make outbound contacts as appropriate to maintain or enhance that service. To provide comprehensive and knowledgeable information and service to internal and external customers regarding mortgages, investments and other financial services as appropriate, using computer based systems to effect a satisfactory, appropriate and timely solution. The jobholder will also be expected to fulfil the secondary role of administrator/business processor to meet the needs of the business.

Key Accountabilities

Customer Service – Weighting 60%

To identify and meet the needs and expectations of customers through the application of the skills and knowledge Acquired for the role and deliver exceptional customer service.

To ensure that policies and procedures are adhered to, including compliance to Society policies, Contact Centre specific policies and procedures, the Financial Services Act, mortgage code, etc.

To ensure that all individual targets and KPI's (Key Performance Indicators) are consistently met or exceeded, understanding the relevance and impact of those factors in the team's overall performance.

Business Development/Sales Opportunities – Weighting 30%

Use skills and knowledge of products to consistently identify opportunities to maximise sales potential. This will include sales of non regulated products, referrals to Personal Financial Managers, retention of customers and appropriate growth of account value.

Continually ensure that all agreed targets are met or exceeded.

Personal Development – Weighting 10%

To continually develop own skills by attending all required training courses and maintaining an up to date knowledge of products, services, systems and work processes necessary to carry out the role and to achieve accreditation in relevant business skills.

To take ownership of own continuous performance improvement plan and personal development, ensuring regular reviews with team performance manager are carried out.

Working Relationships

- Customers
- Branch Network
- Internal Support Functions (other teams/staff)
- Line Management
- Group Subsidiaries
- Intermediaries
- Solicitors
- Business Partners

Skills, Knowledge and Experience Required

Contact Handlers will be required to possess good levels of education and skills including:

- Keyboard proficiency and PC skills.
- Minimum Society education standards – 4 GCSE’s (including Maths and English) or relevant qualifications.
- Experience in a financial services related working environment.
- Frontline customer service experience.
- Ability to communicate effectively.
- Possession of a professional telephone manner.
- High standard of personal motivation and initiative.
- Ability to respond positively to working within a pressurised environment.

Core Corporate Competencies

▪ Customer First	Making customers and their needs a primary focus of one’s actions; developing and sustaining productive customer relationships.
▪ Quality Orientation	Accomplishing tasks by considering all areas involved, no matter how small; showing concern for all aspects of the job; accurately checking processes and tasks; being watchful over a period of time.
▪ Continuous Learning	Actively identifying new areas for learning; regularly creating and taking advantage of learning opportunities; using newly gained knowledge and skill on the job and learning through their application. Generates innovative solutions in work situations; trying different and novel ways to deal with work problems and opportunities.

Key role Competencies

▪ Sales Ability /Persuasiveness	Using appropriate interpersonal styles and communication methods to gain acceptance of a produce, service, or idea from prospects and clients.
▪ Managing Work	Effectively managing one’s time and resources to ensure that work is completed efficiently.
▪ Communication	Clearly conveying information and ideas through a variety of media to individuals or groups in a manner that engages the audience and helps them understand and retain the message.