

ROLE PROFILE

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

Role Purpose

The primary purpose of this role is to provide technical and administrative support in the Contact Centre. The aim will be to provide the highest standards of customer service through the efficient administration of the Direct/Postal Accounts, Investment Accounts/Bonds, Mortgage Accounts and Insurance matters. As such, the focus will be on the delivery of right first time processing of customer correspondence and service requests, involving routine input, to the Society's set service standards. As a secondary role, the jobholder will be required to handle direct customer contact over the telephone (or through other electronic channels such as email) or face to face. The jobholder will be able 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.

Key Accountabilities

Technical/Administrative Support – Weighting 70%

Process customer business, e.g., requests for information; amendments to accounts; open/close accounts; and perform other administrative tasks as allocated to the team to a high standard of accuracy and quality data input. 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. Deliver technical support and advice to frontline customer contact staff and other business areas as required.

Direct Customer Service – Weighting 20%

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. 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

The role will involve a series of interactions with specific parties:

- Customers
- Branch Network
- Internal Support Functions (Other Teams/Staff)
- Line Management
- Group Subsidiaries
- Intermediaries
- Solicitors
- Business Partners

Skills, Knowledge and Experience Required

Contact Support 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

▪ Contributing to Team Success	Actively participating as a member of a team to move the team toward the completion of goals.
▪ Building Trust	Interacting with others in a way that gives them confidence in one’s intentions and those of the organisation.
▪ Sales Ability / Persuasiveness	Using appropriate interpersonal styles and communication methods to gain acceptance of a product, service, or idea from prospects and clients.