

Job Description – Customer Services Officer

Department:	Retail	Grading:	Grade B	Last Update:	August 2007
Purpose:	To contribute to the growth of the funding portfolio through the accurate and timely processing of transactions, the provision of quality customer service and the promotion of SBS products and services.				
Reporting to:	Senior Customer Services Officer or to any other representative of the Employer designated from time to time by the Employer.				
Staff Reporting to this Position:	Nil				
Key Result Areas:	The Customer Services Officer has responsibility for transaction processing, quality customer service and SBS products and services promotion. This involves the following key result areas:				
Funding	<ul style="list-style-type: none"> • Contributes to the efficient operation of the branch through the accurate and timely processing of all transactions and account maintenance, including investment instructions, account information requests, withdrawals, loan repayments, school banking, etc. • Endeavours to increase the levels of funds held with SBS by new and existing clients by identifying and evaluating client needs' through observation, listening and questioning techniques, and ensuring quality recommendations that will satisfy the client and influence their decision-making process towards SBS and therefore meeting SBS's longer term strategic goals. • Responsible for influencing members' decision making so that they transfer their 'main bank' transactional banking to SBS and utilise SBS' range of non-term deposit products, which assists the branch meet its funding margin objective. • Opens new accounts, completes associated documentation and loads into the banking system as per SBS policy and procedures. • Responsible for daily balancing requirements and updating investment records as appropriate. 				
Products Promotion	<ul style="list-style-type: none"> • Maintains a complete understanding of all products and services offered via SBS distribution channels, with knowledge sufficient to discuss product attributes fully and confidently. • Contributes to the promotion of the branch by preparing displays, co-ordinating and distributing promotional materials and organising functions. • Develops and maintains relationships with new and existing clients in order to capitalise on opportunities to cross-sell SBS products and services to existing and potential clients. • Completes new account documentation and loads into the banking system. • Undertakes proactive promotion to enhance the awareness of SBS and its products and services when dealing with clients. • Responsible for making referrals to Banking Consultants, Financial Advisers, SBS Insurance officer, Finance Now officers, Senior Investment Consultant and Commercial Manager as the opportunity arises for existing and potential members to utilise SBS products and services. 				
Quality Customer Service	<ul style="list-style-type: none"> • Capitalises on opportunities to demonstrate superior customer service during communication with clients and professionals either by phone, correspondence and/or one-on-one meetings, through the provision of courteous, efficient solutions to their needs. • Shares responsibility for the ongoing improvement in the branch through participation in quality audit processes and submitting suggestions for improvements to processes. 				

**Operational
Activities**

- Contributes to the operation of the branch by maintaining a filing system and updating and monitoring client records.
 - Ensures the accurate and timely processing and delivery of all certificates, account information, quarterly reports etc., to clients.
 - Co-ordinates ordering and monitoring of branch stationery levels.
 - Contributes to the flow of communication within the team, by actively participating in staff meetings.
 - Ensures compliance with security and safety policies and procedures within the branch including opening procedures, camera surveillance and maintenance, video monitoring, robbery and fire drill procedures and accident and hazard identification and reporting requirements.
 - Provides information and reports to the Senior Customer Services Officer or any other representative of the Employer designated from time to time as requested on funding and other activities.
 - Performs other such duties as may be reasonably required by the Senior Customer Services or any other representative of the Employer designated from time to time.
-

Person Specification – Customer Services Officer

Purpose: To define the required and preferred key personal qualities, work experience and qualifications necessary to undertake the position.

Work Experience: Work experience necessary to competently perform the duties of this position include:

Required

- Previous customer service experience
- Good typing, numerical and keyboard skills

Preferred

- Knowledge of funding processes
 - Previous administrative duties
-

Personal Qualities: Personal qualities necessary to perform the duties of this position include:

Required

- Good standard of computer literacy
 - Excellent standard of oral and written skills
 - Ability to organise and be systematic
 - Able to work in a team environment
 - Works well under pressure and in high volume workflow environment
 - Strong commitment to quality customer service
 - Willingness to be multi-skilled
-

Qualifications: Minimum qualifications required to undertake this role include:

Required

- Nil

Preferred

- Nil
-