

Position Description

Date of Creation: June 2021
Position Title: Member Service Officer (Customer Service Officer)
Department: Advice Hub or Service Centre
Location: Retail
Reports To Position: Manager or Officer in Charge
Direct Reports: N/A

Organisational

SERVICE ONE Alliance Bank (SERVICE ONE) is a 100% Member-owned mutual and social enterprise, with Branches across the ACT and South Eastern NSW. SERVICE ONE has approximately 20,000 Members (known as our Members) and we are known for our professional and personal approach. SERVICE ONE provides Members with access to a wide range of financial, banking and community solutions.

At SERVICE ONE we instil a culture that acknowledges staff are an integral part of achieving our goals and actively invest in, develop and empower our people to assist Members with their financial needs and make dealing with us as easy as possible.

Part A: Job Specification

Job Purpose

The Member Service Officer is primarily responsible for personally servicing Members with their enquiries and counter transactions, promoting the products and services of SERVICE ONE with an emphasis on meeting sales targets and objectives.

Reporting & Relationships

The Member Service Officer reports directly to the Advice Hub Manager or Officer in Charge and has no direct reports.

Key Accountabilities

Key Result Area	Accountability
Member	<ul style="list-style-type: none">) Identify Members' needs and help them reach their goals by offering relevant banking solutions) Build strong and established connections with our Members through optimisation of Member engagement related activities) Conduct Member calling programs to meet the growth expectations of the branch

	<ul style="list-style-type: none"> J Assist the Management in the execution of the branch business plan J Execution of Member acquisition and retention strategies J Execution of strategies to enhance Member experience and advocacy J Build relationships with new and existing business Members J Provides financial services and carries out the transaction duties and telephone enquires as required
People	<ul style="list-style-type: none"> J Assists Management to develop and maintain an environment that motivates, holds accountable, engages and develops the skills of the team J Assist with the day to day operations within the branch – specific duties will be identified based on the structure of the branch
Financial	<ul style="list-style-type: none"> J Support the Branch's execution of strategies to grow loans and deposits J Generate sales opportunities as specified in the budgets and other key objectives as nominated and agreed
Risk	<ul style="list-style-type: none"> J Comply with all SERVICE ONE policies and procedures at all times J Support a culture that embeds the consideration of risk and compliance in all decision making J Regular audits indicate good understanding of cash management procedures and compliance with policies J Cash drawers balance at end of day and discrepancies are identified and rectified J Breaches of policies/procedures are identified and Risk IDs submitted in a timely manner with action plans to address identified issues.
Values	<ul style="list-style-type: none"> J Exemplifies SERVICE ONE values in every interaction with Members, staff and other stakeholders. J Demonstrate consistent behaviour in accordance with Service One's values, mission and strategies J Drives self improvement and product knowledge J No legitimate complaints from Members
	<ul style="list-style-type: none"> J Assists the business performing other duties as required in line with skills and ability

Part B: Person Specification (Minimum Requirements)

Knowledge & ability

-) Extensive sales and customer service experience
-) Previous banking experience preferred
-) Exceptional verbal and written communication skills
-) Proficiency with computers, especially with CRM software
-) Strong time management and decision making skills

Technical, qualification & business Skills

Minimum Qualifications

-) FSRA Accreditation Tier 2

Assessments Required:

-) Reference check (2)
-) Police, insolvency and regulatory checks