# Job description

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| Job title: CUSTOMER SERVICE OFFICER  | grade: SCALE B |
| Job holder:  | date: |
| Reports to (title): OPERATIONS MANAGER  |  |

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| job purpose (one statement explaining the job’s overall purpose) |
| To deal with all member queries and issues in a friendly, efficient and effective manner in order to provide the best customer service possible. |
| Key Responsibilities  |
| 1. To answer telephone calls within four rings and deal with transactions promptly to ensure efficient customer service for the credit unions members.
2. Dealing with members face to face, over the telephone and via emails in a polite and friendly manner ensuring good communication and first class customer service.
3. Responsible for checking and responding to member e-mails, dealing with the emails or passing them to the relevant person efficiently and speedily.
4. To accurately update customer records ensuring they are correct and up to date.
5. Responsible for dealing with the incoming post; distributing it to the relevant person and dealing with the out going post at the end of the day in a timely fashion.
6. Responsible for sending out statements and birthday cards to members, making sure these are sent out and within the correct time frame.
7. To assist with or undertake the website update when required so that correct and relevant information is found on the website for members and potential members.
8. To carry out electronic and paper filing in addition to faxes, making sure that filing is completed accurately, efficiently and timely.
9. Assisting with mailings and marketing projects as and when required to support others in the team.
10. Efficiently updating payrolls to ensure records are correct and up to date.
11. Accurately carrying out banking transactions for members in order to give a high quality service at all times
12. To assist the Operations Manager in his/her duties and possibly carry out any general office duties as and when required, including filing, photocopying etc.
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| relevant facts and figures relating to the job |
| Part of the customer services team responsible for the efficient handling of up to 350 member telephone calls and 30 member personal visits per day. |
| knowledge, SKILLS and experience required for satisfactory performance in the job |
| This role is customer facing through emails, telephone and face to face. This role requires someone with patience, organisational ability and excellent customer service skills. Competencies for the role are as follows:**Customer Focus***Focuses on customer, provides high quality service. Understands membership served*Provides a high level of service to customers. Maintains contact with customers, works out what they need and responds to them. Is aware of issues of diversity, and understands and is sensitive to cultural and racial differences.**Effective Communication***Communicates effectively both verbally and in writing*Speaks clearly and concisely, and does not use jargon. Writes in plain English and uses correct grammar. Listens carefully to understand.**Openness to change***Recognises and responds to the need for change and uses it to improve performance*Understands the need for change and is willing to adapt to it. Is flexible and prepared to try out new ideas. **Personal Responsibility***Takes personal responsibility for making things happen and achieving required results*Takes personal responsibility for own actions and for sorting out issues or problems that arise. Is focussed on achieving results to required standards and developing skills and knowledge.**Planning & Organising***Plans, organises and supervises activities to ensure efficient and effective use of resources*Plans and carries out activities in an orderly and well structured way. Prioritises tasks, and uses time in the best possible way, and works within appropriate policy and procedures.**Problem Solving***Gathers information from a range of sources. Analyses data to identify problems and issues*Gathers enough relevant information to understand specific issues and events. Uses information to identify problems and draw logical conclusions. Makes good decisions.**Respect for Diversity***Considers and demonstrates respect for others irrespective of position, background, status, etc*Understands other people’s views and takes them into account. Is tactful and diplomatic when dealing with people. Treats people with dignity and respect at all times, no matter what their background, status, circumstances or appearance.**Team Working***Develops strong working relationships within and outside own team to achieve common goals*Works effectively as a team member and helps build relationships within it. Actively helps and supports others to achieve team goals. |
| Agreed by ……………………………………………………….. (Job holder)Approved by …………………………………………………….. (Manager/Supervisor)Date …………………………………….. |