

## ROLE PROFILE

<b>JOB TITLE</b>	<b>CUSTOMER SERVICE ADMINISTRATOR</b>
<b>FUNCTION</b>	<b>HEAD OFFICE</b>
<b>REPORTING TO</b>	<b>CUSTOMER SERVICE MANAGER</b>
<b>REPORTEES</b>	<b>NONE</b>

### **JOB PURPOSE**

To administer customers mortgage and investment accounts in accordance with Society policy and procedures, to deliver high quality customer service, accurate and timely administration, compliance with Society policies, controls and regulatory requirements, to implement change and encourage good customer outcomes.

### **KEY RESPONSIBILITIES**

- To carry out customer requests and transactions accurately and promptly, in line with Service Level Agreements, making any decisions within policy and procedural guidelines.
- To ensure mortgage and investment administration is accurately executed and maintained to protect the integrity of Society customer data across the core systems, to enable regulatory or internal reporting as required.
- To contribute to the Society's scheduled administration events including statement production, insurance renewals, tax year end and business year end routines.
- To administer Society mortgage product maturities and investment bond maturities.
- To contribute to the continuous improvement of service, systems, procedures and policy to ensure they reflect the Society's core values, risk appetite and meet business requirements.
- Contribute to generation of sales leads targets across the Society's range of products & services.
- To maintain the required level of personal and professional training and competency required for this role.
- To build effective relationships with internal and external customers and provide technical support and expertise as required.
- To maintain and apply regulatory compliance and control within areas of responsibility.
- To undertake any other duties or projects that may be regarded relevant to the job role.

**SKILLS AND EXPERIENCE**

- Excellent customer service skills
- Strong administrative skills
- Good telephone skills
- Basic keyboard and IT skills
- Planning and organising skills
- Attention to detail
- Team worker
- Self starter with a can do attitude