



**Job Description – Customer Services Officer**

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# Welcome

**Serve and Protect Credit Union was founded in 2003 following a merger between several credit unions, with its history dating back as far as 1986.**

For many years the credit union served exclusively Police Officers, Police Staff and their family members. That changed in 2012 when the credit union began to welcome employees from the Prison & Probation Service. This was followed by continued expansion into the public services, and today the credit union now provides its financial services to employees across the Police, Prison, Military, Fire and Health sectors.

Serve and Protect is now one of the largest credit unions in the UK and currently serves over 39,000 members. As a credit union, our mission is to improve the financial resilience of those who serve and protect. We recognise the important role our members play within society and the day-to-day challenges they face while protecting our nation. That is why we are passionate about helping our members prepare for their financial future – so they are ready to respond to any financial challenges they may face throughout their career.

Committed to the principles of people helping people, we are one family, in which our members save in order to help their fellow members borrow. We pride ourselves on being a responsible lender they turn to in times of financial need – meaning they can remain focussed on protecting the nation, to the very best of their ability.



**Serve and Protect Credit Union** Customer Services Officer

# Application Process

Thank you for your interest in joining our team at Serve and Protect Credit Union, please find below details of the application process and further information to assist you in its completion.

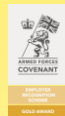
In order to apply, you should send a CV with a summary as to why you feel you may be suitable for the role to **Myrel Robinson** ([mrobinson@serveandprotectcu.co.uk](mailto:mrobinson@serveandprotectcu.co.uk)). Please put '**Customer Services Officer**' in the subject line of your email.

The timeline for recruitment is:

**Job Advertised:** 1 July 2022  
**Closing Date:** Position open until filled

We will look to conduct interviews shortly after the closing date. All applicants will be notified whether they are invited to interview or unfortunately unsuccessful on this occasion.

**We look forward to receiving your application!**



# Job Description

**Position:** Customer Services Officer  
**Responsible to:** Member Services Supervisor  
**Location:** Guardians House, 2111 Coventry Road, Sheldon, Birmingham. B26 3EA  
**Role Type:** Full Time  
**Remuneration:** £17,887 - £20,952 + benefits

## Role Summary

Reporting to the Member Services Supervisor, you will work closely to deliver a first-class customer service experience to the Credit Union members. You will ensure that all administrative tasks are carried out in a timely, accurate and efficient manner to guarantee the highest level of member satisfaction.



# Person Specification

## Personal Attributes

You are self-motivated and well organised.

You are resourceful and able to think clearly in a busy environment.

You have the ability to multi-task and can work on your own initiative



# Key Responsibilities (1)

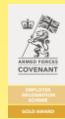
- 3 ring telephone policy, i.e. all calls must be answered within 3 rings
- Responsible for meeting the needs of our members in a polite, respectful and efficient manner ensuring their first impression of the Credit Union is first-class
- Meeting KPIs and targets set for you by the Finance & Operations Manager
- Welcoming members into office and handling their request
- Responsible for keeping emails up to date and replying to our members promptly
- Responsible for setting up new members in a timely manner
- Ensuring details are accurate when setting up accounts and updating existing members records
- Accurately filing electronic and hard copy documents
- Dealing with incoming post and circulating to the relevant departments
- Ensuring outgoing post is sent daily
- Handling member account closures
- Setting up direct debits
- Taking Debit Card payments from our members





# Key Responsibilities (2)

- Carrying out reporting and updating accounts upon review of report, e.g. New Member, Youngster, Dormant Accounts
- You will undertake regular training and be knowledgeable about all products and services
- Promote the Credit Union products and services to our members and potential membership
- Have an understanding of the Credit Union policies and procedures
- Comply with data protection legislation and to maintain strict confidentiality and security in dealing with all information relating to the Credit Union and its members, in accordance with policies and procedures
- To work to the policies and procedures including relevant legislation and guidelines set down by the Credit Union, the Financial Conduct Authority, TCF principles, the Consumer Credit Trade Association the Financial Ombudsman Service & the Data Protection Act 1998 and any other appropriate service standards
- Assist with training new members of staff
- You will be expected to work effectively with other departments in order to make a positive contribution to the work of the Credit Union
- Undertake additional training as and when required.
- Positively contribute to the culture of the Credit Union
- Any other duties that may reasonably be requested by the Credit Union





# Person Specification

## Qualifications & Experience

### Essential

- Minimum of 1 years' experience in an administration role
- Minimum of 1 years' experience in a customer orientated environment
- Excellent communication skills
- Proficient in MS Office
- Excellent organizational skills
- Ability to work under pressure
- Ability to multi-task

### Desirable

- Understanding and appreciation of the Credit Union movement
- Experience working in a regulatory environment



# Benefits

- ✓ **Minimum of 29 days paid annual leave inclusive of bank holidays**
- ✓ **Access to our Employee Benefits Scheme**
- ✓ **Employee Assistance Programme (EAP)**
- ✓ **We offer a 5% employer pension contribution**
- ✓ **Participation in our annual discretionary bonus scheme**
- ✓ **Learning and development opportunities**
- ✓ **Save and borrow with repayments from your pay**

