



# Bank of us.

Tasmania | Community | Customer

## Position Description



**Name:**  
Vacant



**Title:**  
Customer Experience  
Consultant



**Reports to:**  
Customer Experience  
Leader



**Location:**

## Role Purpose

Your number one aim in this role is to deliver a superior one touch (face to face and digital) service which seamlessly meets our customers complete financial needs, positioning Bank of us as the Bank of choice for all Tasmanians to partner with to achieve their dreams and thereby actively building our market share in Tasmania – so that we can help even more people!

Key to your success will be your ability to have fun while you work, build strong relationships with all teams across the organisation, take a collaborative approach and keep the needs of our customers front of mind at all times.

## Skills we are looking for

- Excellent verbal and written communication skills.
- Excellent relationship building skills.
- The ability to prioritize and manage multiple tasks.
- A strong focus on the achievement of results.
- Attention to detail.
- The ability to contribute positively to a high performance organisational culture.
- Proficiency (intermediate) in the use of relevant software programs (e.g. Microsoft Office).

## Personal Qualities we are looking for

- A commitment to providing exceptional service.
- A commitment to being a team player.
- Self-motivation and an ability to work with autonomy.
- A professional manner and well-presented appearance.
- Strong problem solving and decision-making skills.
- Willingness and ability to acquire new skills and knowledge.
- Strong set of personal and business values which complement the organisation's culture, values and behaviours of Live it, Love it, Own it.

## To succeed you will have (to be addressed as part of the application)

### Experience

- Proven track record in achieving sales results.
- Strong set of personal and business values which complement the organisation's culture and values.
- Previous experience in the banking/finance industry (desirable).

### Qualifications & Licenses

- FSRA ASIC Tier II Accreditation or the willingness and ability to undertake and maintain this qualification.
- Certificate III Financial Services (desirable).
- Hold and maintain a current Drivers' license.

## Key Relationships

### Internal Relationships

- Other customer experience team members
- Retail Support team
- Lending Sales & Support team
- Technology Operations
- Finance

### External Relationships

- CGU
- Western Union

## Key Responsibilities

### People

**Have fun while building strong relationships with your immediate team and other internal teams within Bank of us and share thoughts, ideas and feedback with peers, celebrate success together and work closely and constructively in delivering exceptional service.**

- Build strong relationships with members of your immediate team and across other teams within Bank of us and share thoughts, ideas and feedback with peers, celebrate success together and work closely and constructively in delivering exceptional service.
- Champion the Bank of us Customer Experience Program and other initiatives aimed at improving organizational sales and performance capabilities. Undertake training as required.
- Attend team operational and sales meetings as per the Bank of us operating rhythm.

#### Success looks like:

- Personal behaviours aligned to Live it, Love it, Own it.
- Evidence of continual improvement

### Customer

**Deliver a superior one touch sales and service of all retail banking solutions across all channels (retail store and digital inbound/outbound calls) which seamlessly meets our customers' complete financial needs to actively retain and expand the Bank of us customer base within the state.**

- Actively provide customers with one touch retail transactional services (e.g. deposits, withdrawals, opening of new accounts) and strive to continually provide exceptional customer service by proactively engaging customers at every opportunity to identify their immediate and longer-term needs, discussing possible options and providing accurate information about relevant products and services, both via our face to face channel and contact centre.
- Undertake the processing of investment renewals and the completion of insurance proposals in a timely and seamless manner that ensures superior customer service.
- Contribute to the development and maintenance of a sales culture that aligns with Bank of us' strategy of meeting customers complete financial needs and positioning Bank of us as the customer's main financial institution.
- Champion the Bank of us chat with us methodology and other initiatives aimed at improving organisational growth and performance capabilities. Undertake training as required.

#### Success looks like:

- Retention of transactional customers
- All internal and external SLA's are met
- Maintain or increase NPS CE results

### Business

**Actively contribute to the achievement of the team's operational and sales targets through the development and maintenance of a sales culture that aligns with Bank of us strategy, vision, values and behaviours.**

- Provide accurate and timely information to the Customer Experience Leader to enable monitoring of operational and sales activities.
- Assume full responsibility for the effective custody, ongoing management and balancing at the end of the working period of allocated cash float.
- Assist with the smooth operation of the retail activities through providing assistance in the preparation of daily banking, supporting the onboarding of new tribe members, ensuring promotional material is current and displayed as per Bank of us Brand guidelines, providing assistance with mail duties, maintaining office equipment in good order and ensuring that all work areas are kept neat and tidy at all times.
- Actively support our specialist lending team through identifying and referring quality home and personal finance leads through the retail channels.

#### Success looks like:

- Increase in products per customer
- All internal and external SLA's are met
- Sales targets met

## Key Responsibilities

13 August 2024

### Risk, Values and Behaviours

Ensure that all aspects of the role are carried out in accordance with Bank of us vision, values, behaviours of Live it, Love it, Own it, policies and procedures and comply with relevant State and Federal legislation.

- Contribute to maintaining Bank of us' reputation for corporate responsibility by ensuring all actions and behaviours are in accordance with Bank of us' compliance requirements. These include using established procedures when handling customer enquiries and requests for service and maintaining an up-to-date knowledge and accreditation of Bank of us policies, procedures, products and services

### Success looks like:

- Risk, Values and Behaviours as per P2S.

### Other

Undertake any other reasonable duties as directed by the Customer Experience Leader or Retail Sales & Service Manager from time to time.

Employee's Signature

Date

Leader's Signature

Date

