

Role Purpose Statement



Role title:	Customer Advisor 2
Division:	Consumer Banking
Team:	Retail
Role reports to:	Branch Manager
Group (1 to 7):	Group 1
Purpose:	To support delivery of the One NAB Plan through providing a great customer experience that drives customer advocacy through understanding customer needs and providing appropriate servicing solutions, within our risk guidelines.
Accountabilities:	<ul style="list-style-type: none">• Deliver a signature customer experience by providing the highest level of customer service through efficient queue management, uncovering customer needs with Inspire skills and by answering customer requests in a professional and timely manner.• Determine customers' goals and aspirations through quality Inspire conversations (phone and branch) and deepening customer relationships at every interaction.• Deliver Branch plan through achievement of increased Customer Advocacy, Deepening Customer Relations, proactively manage risk through helping build an eRisk culture, generating attractive returns with quality referrals and driving Smarter Banking.• Complete activities for account opening, unsecured lending and deposit products to meet customer needs.• Ensure accuracy in performing transactions to minimise cash errors and their associated costs and customer advocacy implications.• Provide support and assistance to Branch Manager/Assistant Manager/Banking Advisor, as required.• Support branch customer engagement activities/initiatives to achieve revenue growth and branch performance plans.• Support strategic initiatives designed to improve productivity, digital migration, quality of conversations, and banking/wealth integration.• Maintain an in depth awareness of Bank products and services.• Utilise knowledge of the customer's needs to promote the Bank's products and services to new and existing customers by engaging with customers and identifying needs and referring them to the appropriate specialist or self-service channel.• Help customers to achieve their financial goals through identifying their needs and accurately recording referrals (CA Leads), in a timely manner.• Demonstrate NAB Values at all times focusing deepening customer relationships and delivering professional and efficient customer service.



- Ensure that all work is performed in accordance with the requirements of the Health & Safety Policy, procedures and legislation.
- Professional conduct and image must be maintained at all times including compliance with NAB's dress standards and Code of Conduct.
- Completion of required role and mandatory training and accreditation/certification requirements.
- Proactively identify opportunities for self-development to accelerate performance and support the delivery of the One NAB Plan by undertaking identified development actions (i.e. regular performance and career conversations, coaching, IDP).
- Completion of assigned eRisk activities and tasks.
- Proactively monitoring risk and assurance requirements within agreed Risk Appetite and managing non-compliance in a timely manner.
- Identification and escalation of events / losses / breaches as incurred.

**Financial
accountability:**

As assigned by People Leader.

**People
accountability:**

- Direct reports Nil