



## Role Purpose Statement

### Customer Advisor 1 - Casual

<b>Position Number</b>	65149545
<b>Position Address</b>	196 Summer St Orange, New South Wales. 2800 Australia
<b>Organisational Unit</b>	Central West Relief
<b>Global Function</b>	Retail Banking
<b>Global Function Desc</b>	Provide financial advisory services, fully integrated financial solutions and risk management for Retail customers.
<b>Generic Job No.</b>	70002402
<b>Generic Job</b>	Customer Adviser - Leave & Relief
<b>Job Differentiator No.</b>	93197386
<b>Job Differentiator</b>	##Conduct pre-sales activities for the branch sales team and specialists. ##Efficient & accurate processing of customer value transactions: including EBD/ECD processing, ATM servicing and balancing, bank cheques, international and over the counter transactions according to NAB#s service standards
<b>Enterprise Behaviour</b>	Responsible for behaving in accordance with NAB's Code of Conduct and demonstrating the Enterprise Behaviours in all customer, community and employee interactions.  Protecting NAB information and information systems is the responsibility of every employee. For your specific responsibilities refer to Use of Information and Information Systems - User Responsibilities within the Group Information Security Standards.
<b>Purpose</b>	Assist branch achieve overall performance targets by responding to customer enquiries and requests in order to deliver the highest level of customer satisfaction.
<b>Working Relationships</b>	Branch Manager (reports to this position)/Assistant Manager (frequent) ##Supervision, Performance Review, Planning, Training, Support, Guidance, Mentoring. ##Reporting, target setting, and monitoring. ##Enquiries, authorisations. ##Ensuring compliance with policies/procedures  Other employees in Branch (frequent) ##Team meetings ##Coaching, sharing of best practices ##Teamwork assistance (as required) ##Enquiries, authorisations ##Ensuring compliance with policies/procedures  Customers (frequent) ##Identify needs and opportunities for quality referrals to sales



	<p>team in order to provide support and build ongoing relationships</p> <p>##Encourage migration of customers to convenience &amp; self service banking</p> <p>##Perform value transactions, action enquiries, requests and general account maintenance.</p> <p>##Efficient and satisfactory customer complaint resolution or referral</p> <p>Employees in support areas (moderate)</p> <p>##Operations policy &amp; procedural enquiries.</p> <p>##AMS customer account enquiries.</p> <p>##Cards /Collections</p> <p>##Direct and Branch Support</p>
<p><b>Responsibilities</b></p>	<p>Responsibilities for health and safety are assigned to all employees. For your specific responsibilities refer to Responsibilities for Workplace Health and Safety located on the intranet under People Toolbar;</p> <ol style="list-style-type: none"> <li>1.#To conform with all internal operating policies and procedures relevant to the position.</li> <li>2.#Ensure all personal training records are maintained and kept up to date</li> <li>3.#Provide professional and ethical behaviour in your actions by ensuring compliance with external legislation, bank standards and internal operating policies and procedures relevant to the position.</li> <li>4.#Ensure that all work is performed in accordance with the requirements of the Health &amp; Safety Policy, procedures and legislation. Take reasonable care for own Health &amp; Safety, as well as that of others.</li> </ol> <p>Financial</p> <p>##Identify referral opportunities (Teller Leads) for the Branch Sales team that will enable the achievement of overall Branch performance targets.</p> <p>##Create customer awareness and use of self service banking transactional and service channels, such as ECD, EBD, and ATM, Internet, IB kiosks and Telephone Banking</p> <p>##Support Branch business development activities/initiatives to achieve revenue growth and customer satisfaction levels.</p> <p>##Ensure accuracy in performing transactions to minimise cash errors (and their associated costs &amp; customer service implications).</p> <p>Customer Service</p> <p>##Efficient &amp; accurate processing of customer value transactions: including EBD/ECD processing, ATM servicing and balancing, bank cheques, international and over the counter transactions.</p> <p>##Perform basic banking &amp; general account maintenance services to customers, including customer profile maintenance, term deposit prepayments, stop payments, card maintenance, and special clearances.</p> <p>##Undertake transaction authorisations as outlined in the Branch Signing Authorities Matrix.</p>



	<p>##Ensure the highest level of customer satisfaction and service is achieved through efficient queue management and by answering customer requests in a professional and timely manner.</p> <p>##Welcome customers as they enter the Branch floor.</p> <p>##Perform pre-sales activities for the branch sales team and specialists by identifying opportunities, proactively communicating products and services and referring to the appropriate channel.</p> <p>##Maintain an in depth awareness of Bank products and services. Utilise this knowledge to promote the Bank's products and services to new and existing customers by engaging with customers and referring them to the appropriate specialist or self service channel.</p> <p>##Process value transactions # as per task matrix and account maintenance activities for all customers in a timely, accurate and friendly manner.</p> <p>##Professional conduct and image must be maintained at all times including compliance with NAB's dress standards and Code of conduct.</p> <p>##Adherence to operational, organisational and regulatory compliance requirements and demonstrate and promote NAB Corporate Principles &amp; Behaviours</p> <p>People / Leadership</p> <p>##Team meeting attendance and participation.</p> <p>##Demonstrate NAB Corporate Principles &amp; Behaviours at all times.</p> <p>##Display the desired attitudes/behaviours to focus on delivering professional and efficient customer service.</p> <p>Administration</p> <p>##Responsible for accurate balancing/marshalling of cash and storage of cash in accordance with NAB's policy and procedures.</p> <p>##Assist Manager / Assistant Manager in accurately performing day-to-day activities of the branch including ATM, EBD and completion of branch eRisk tasks.</p> <p>##Quality identification and accurate recording of referrals (Teller Leads) to the Branch Sales team.</p> <p>##Provide support and assistance to Branch Manager / Assistant Manager / Banking Adviser, as required.</p>
<p><b>Additional Information</b></p>	<p>##Likely to have:</p> <ul style="list-style-type: none"> <li>o#Knowledge of NAB products and services.</li> <li>o#Completed or soon to be completed all required pre # appointment training, mandatory compliance training, teller's training course and accreditation</li> <li>o#Proven service and referral skills.</li> <li>o#Time management skills.</li> <li>o#Completed, or soon to have completed, all required pre-appointment training.</li> <li>o#0-2 years experience within financial services, or retail banking specifically.</li> <li>o#Either AFSL Tier 2 Accredited or working towards Tier 2 Accreditation</li> </ul>



	##A passion to provide the highest level of customer satisfaction. ##Ability to identify and refer quality sales opportunities. ##Strong product knowledge, people leadership/coaching skills.
<b>QUALIFICATIONS AND SKILLS</b>	
<b>Risk</b>	
AML Threshold Transaction Reporting	Obtained
Customer Feedback	Obtained
Risk Ready - For New Starters Only	Obtained
Safety and Security	Obtained
<b>Sales and Relationship</b>	
CA Job Ready Workplace Assessment	Obtained
Credit Card Interest	Obtained
<b>Service Focus</b>	
Aggressive Customer Training	Obtained
Hold Up Awareness	Obtained