Position description

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| **Date of creation** | June 2018 |
| **Position title** | Customer Consultant |
| **Division** | Customer |
| **Team** | Consumer Connection Fulfilment |
| **Location** | Ipswich/Adelaide |
| **Reports to position** | Team Leader |
| **Direct reports** | Nil |

Organisational overview

For more than 150 years, Bendigo and Adelaide Bank has been helping people. So it’s only natural we’ve made it our strategy to be Australia’s most customer-connected bank.

In an increasingly ‘virtual’ world – where customers want to connect with us over the phone, through their mobile device, online or by email – it’s Consumer Connection that brings the ‘human element’ to these transactions.

In Consumer Connection we aim to create service excellence for our customers. We deliver product and service solutions, sales and service that helps acquire and retain customers – and encourages them to do more with us.

As a team, we support one another and lead by example. Our strong customer commitment is underpinned by our values and the expectations we have of each other.

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| **Part A: Job specification** |

Job purpose

The Customer Consultant is the voice of Consumer Connection in both call and digital interactions with our customers. The role connects customers with products and services, making their interaction with our business easy and seamless.

Reporting and relationships

* Peer relationships in Consumer Connection
* Senior Customer Consultants
* Reports to Team Leader
* Works across the Customer division

Key accountabilities

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| **Key result area** | **Accountability** |
| **Customer** | * Respond to customer phone calls, emails and online web messaging within acceptable timeframes, delivering service excellence for each and every customer. * Use the Consumer Connection quality guidelines to build rapport with customers. Demonstrate empathy and professionalism and reflect the bank’s customer-connectedness. * Listen to and understand our customers’ needs and present solutions and identifying opportunities for growth and follow-up until enquiry is fully closed. |
| **People** | * Always look for ways to improve the customer service you deliver. * Care about the Consumer Connection team and the people you work with. * Keep your knowledge and skills up-to-date through ongoing learning and development. * Respond positively to quality and performance feedback. * Participate in Consumer Connection’s career progression and development opportunities. * Support team members by listening to ideas and encouraging others to share and develop ideas. |
| **Process** | * Look for better ways to do things. Identify process improvements that make it easier for our customers to deal with us. * Ensure you are on time, ready and available to respond to customers. * Apply relevant policies and processes to complete all outstanding work. * Strive to always deliver quality work that’s free of errors. |
| **Risk** | * Complete all mandatory training. * Operate within personal approved limits at all times. Where required seek authorisation from the appropriate oversight body (eg Delegated Lending Authority). |
| **Financial** | * Identify relevant products and initiate referrals in order to achieve monthly targets for: * Credit cards * Personal loans * Home loans * Insurance * Deposits * LINX activity * Monitor your performance against your Individual Measurement Plan. Seek feedback from your Team Leader during regular meetings. * Make sure all fees are applied to accounts as per the bank’s fee collection policy. |
| **Values** | * Demonstrate behaviour that’s consistent with the Bendigo and Adelaide Bank values (teamwork, integrity, performance, engagement, leadership and passion). * Keep Consumer Connection’s team expectations front of mind in everything you do. |

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| **Part B: Person specification (minimum requirements)** |

Qualifications, knowledge and experience

* Customer service experience in a retail or sales environment is preferred.
* Demonstrated experience in a performance-focussed environment.
* Experience navigating and operating multiple systems.

Technical and business skills

* Strong communication skills
* Interpersonal skills
* Ability to communicate using verbal queues.
* Customer resolution skills.
* Ability to connect with customers and identify opportunities to suit their needs.
* Ability to build rapport with customers.
* Attention to detail.
* Ability to follow procedure.
* Strong typing skills.
* High level of computer literacy.

Assessment required

* Police check.

Organisation chart