

CASH BOX CREDIT UNION

PERSON SPECIFICATION

Member Services Officer

Personal Requirements of Successful Post Holder

1. **Educational standard/qualification/membership of professional Institutions**
A good standard of general education to GCSE / O level, with good levels of Maths, English and Literacy E
2. **Experience**
Experience of working in a customer facing setting D
3. **Key Knowledge**
Knowledge of equal opportunities D
Knowledge of money laundering requirements D
Understanding of the needs of customers D
Knowledge of the Credit Union sector D
4. **Key Skills**
Excellent keyboard skills E
A good understanding and working knowledge of Microsoft applications including Word; Excel; Outlook; E
A good understanding and working knowledge of social media D
5. **Key Aptitudes and Personal Qualities**
Ability to make effective contributions to a team E
Ability to understand and adhere to internal policies & procedures E
Ability to communicate effectively with a wide range of people E
Good organisational skills E
Ability to prioritise E
Ability to work on own initiative E

Job Description	Member Services Officer
Hours:	20 per week
Term:	Permanent
Location:	Cash Box operates a Hybrid Working Policy. 4 days per week working from home (Monday to Thursday) 1 day per week working from our Denton Office (Friday)
Salary:	D
Reports to:	Operations & Business Development Manager

Main duties and Responsibilities

To deal with all aspects of Customer Service and provide the highest levels of service to our members

To assist the Assistant General Manager and other colleagues in the effective operation of the services provided by the Credit Union ensuring accuracy and attention to detail at all times

- 1 Provide excellent customer services, handling all member enquiries including face to face, telephone, instant messaging and e-mail
- 2 Open new accounts ensuring satisfactory ID is provided
- 3 Process loan applications ensuring the correct product has been allocated and the required evidence is provided to support the loan decision making process
- 4 Process incoming and outgoing payments using a variety of software systems
- 5 Maintain up to date records using credit union software systems
- 6 Process incoming and outgoing mail including scanning, distribution, electronic filing and iMail
- 7 Ensure that records of members and member transactions are input accurately and appropriately, and in a timely manner
- 8 To actively support the development of products, services and initiatives
- 9 To represent the organisation at external events as required

General

- 10 To keep up to date with, and comply with the Policies and Procedures of the organisation
- 11 To be able to work as part of a team, or on your own initiative
- 12 To maintain confidentiality at all times and raise any issues of concern to the General Manager, Assistant General Manager, or the Board of Directors
- 13 To uphold the Credit Union's commitment to equal opportunity and fairness to staff and customers and to promote this to volunteers
- 14 Attend training or other developmental activities as appropriate
- 15 Flexibility to work occasional evenings and weekends as required
- 16 To undertake such other duties as may be reasonably required and commensurate with the grading of the post