

Customer Specialist



Purpose

This customer-facing specialist role has cross-functional responsibilities to deliver exceptional service to our TSB customers. This position will have primary and secondary responsibilities that will deliver activities within their domain expertise (primary) and flex across the business where customer demand requires to support customer service activities (secondary), escalations and having the authority to go the extra mile for TSB customers to deliver positive outcomes.

Primary responsibilities will depend on the functional customer-facing day to day responsibilities of the team.

Role dimensions

- **Reports to:** Manager - Customer Verification or Customer Cards Manager
- **Department:**
- **Direct Reports:** No
- **Financial Authority:** No

Person specifications

- Minimum of 2 years financial services administration experience
- Intermediate computer skills - MS Office skills (Word, Excel, Outlook)
- High degree of attention to detail, demonstrating an ability to monitor and meet productivity targets, accuracy, and data integrity.
- Experience in customer service

Role-specific areas of responsibility

- Take ownership of the primary responsibilities including but not limited to: Onboarding and verification requirements, AML/CFT requirements or Cards operations in line with our regulatory obligations. This will involve interpreting both policy and procedure to establish intent and then make a well-informed decisions.
- Assist with customer-facing secondary responsibilities to support customers across the wider operations flexing to assist where required. This may include (with the right level of training) supporting customer care, financial crime and support services to deliver to process service levels and exceptional customer service.
- This position will support the TSBs distribution network and be the primary contact point for internal branch staff as well as customers for all products.
- Ensure the accurate input of required information for risk ratings so that documentation is always "right first time", while providing effective communication throughout the process to achieve a quality experience for the customer.
- Ensure customers are provided with a great customer service experience through any interactions with the Bank, by ensuring response times and actions are completed within agreed SLA's. Be the experts in all operational customer processes that requirement complete fulfilment of customer needs in both primary and secondary responsibilities.
- Assist the direct line manager in applying all applicable policy and procedure requirements to meet all compliance and legal requirements including supporting the wider operations in critical activity from time to time.
- Take ownership with any escalated customer enquiries and to provide one call resolution.
- To use their delegated authority within the write-off and charge back process where appropriate and advantageous to provide better outcomes for both customer and TSB.

From time to time there may be additional activity not contained within this position description that the appointee is to complete in the interests of the appointment and their personal development.

This position description provides a broad overview of responsibilities. The position description is a living document, and the Bank reserves the right to amend it from time to time as required.