

# Personal Banking Advisor

## Our Values

**People first:** We put you at the center of everything we do

**One team:** We're stronger together

**Innovation:** We find a better way

**Integrity:** We do right by you

**Keep it simple:** We like things straight forward

## Personal Banking Advisor

### Working at TSB

Our people are proud to belong to a 100% independent NZ owned Bank and proud to see the results of their efforts invested back into New Zealand. Our people can see the impact of their work benefitting New Zealanders as they work towards the bank's purpose: Helping New Zealanders get ahead by making banking really easy. Every time. Everywhere.

Our strong corporate values: One Team, People First, Integrity, Innovation, Keep it Simple set our standards and set us apart. We demonstrate our People First value through the distribution of our profit for the benefit of others and by providing our employees with a place to belong, grow, and be recognised.

We work together as a One Team community to ensure a sustainable future and we encourage every employee to have a voice and be an active participant in our success. We aim to create remarkable experiences for our people just as our people create remarkable experiences for our customers.

### Role dimensions

<b>Reports to:</b>	Manager
<b>Department:</b>	Customer Solutions and Service
<b>Job Family:</b>	Customer and Business Support
<b>Location:</b>	Centre
<b>Direct Reports:</b>	0
<b>Total Employees:</b>	0
<b>Financial Authority:</b>	No

### Role requirements

#### Primary purpose

The primary purpose of the role is to ensure the Bank achieves its objectives by developing and building business relationships with both existing and prospective customers by:

- Providing the Banks customers and potential customer with professional, helpful and accurate guidance in the products and services offered by the Bank.
- Converting other Bank customers to TSB.
- Understanding the product and service needs of the customer, ensuring we are identifying the appropriate products and services and linking these to their needs.
- Actively developing and building a long-term relationship between the customer and the Bank, through quality service.

## Role specific areas of responsibility

Key Result Areas	Control Information	Expectations
Promoting services	To ensure that all Bank's products and services are appropriately promoted to deliver good customer outcomes.	Monthly targets and objective results
To build and foster long term customer relationships	That by gaining the customer's confidence through service excellence, long standing relationships are established and maintained. That managed CVI customers are contacted at least once every six months (quarterly if possible) to maintain relationship and establish satisfaction levels.	Customer feedback
Maintain quality customer service	That the highest possible standard of quality customer service is offered and maintained at all times. That information provided to customers and potential customers is accurate and complete.	Customer feedback, mystery shop surveys market share levels
Implement bank policies & procedures	That all Bank policies and procedures are adhered to.	Branch Manager audit
Attend to customer enquiries	That all enquiries are investigated and answered to the customers' satisfaction. Where doubt exists, the enquiry be referred to the Branch Manager.	Customer feedback Branch Manager
Deputise for branch managers (If applicable)	That where requested by the Branch Manager, or relevant head office personnel, act in a relief management capacity at any Branch or office of TSB Bank Ltd.	Monthly targets and objective results
Foster bank's public image	That at all times the image of the Bank is maintained by appearances, behaviour and manner in which quality service is provided.	Mystery shopper surveys customer feedback
Maintain bank security standards	That all Bank records are maintained in a secure manner. That armed holdup procedures are understood and adhered to.	Audit Branch Manager

Complete overseas currency applications	That all applications are completed accurately and faxed/mailed to Foreign Exchange Bureau as soon as possible.	Monthly targets and objective results Results
Action and follow-up CSR referral	That all CSR Referrals are qualified and actioned as soon as possible	
Initiate referrals	That referrals are made to other Bank Divisions such as Realty. That such referrals are followed up with the agent/consultant to ascertain success/failure.	Branch objectives monthly targets
Commitment	Demonstrate and promote the Bank's values in all aspects of the role.	Branch Manager

### **Generic responsibilities**

- Keep up to date with and comply with all Bank policy and procedures.
- Comply with all health and safety policies, directions and instructions and ensure that in the performance of duties not to undermine own health and safety or the health and safety of any other person. Be continually mindful of the Bank's Health and Safety Policy:
  - No business objective will take priority over health and safety.
  - All incidents are preventable.
  - Whilst management have ultimate accountability, we all have responsibility for health, safety and wellness.
  - All employees have the responsibility to stop any job they believe is unsafe or cannot be continued in a safe manner.
- At all times demonstrate the Bank's values
- Embrace change and act as a change agent – accepting, embedding and reinforcing change in the workplace.

## Person specification

### Required experience & qualifications

- 4-5 Years secondary schooling, with NCEA, or equivalent, in English and Maths
- Proficient use of Microsoft word, Excel and Power point
- Organisational and time management skills
- Preferable experience of 1+ years in a customer service role

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 own 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 from time to time as required.