

# Clockwise Credit Union

safe savings & affordable loans

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## 1. IDENTIFICATION OF JOB

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JOB TITLE	Member Services Officer
WORKING BASE	1 St Nicholas Place, Leicester, LE1 5LB
TEAM	Member Services
HOURS OF WORK	20 Hours
SALARY	£8.09 per hour
RESPONSIBLE TO	Operations Manager

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## 2. OVERALL PURPOSE OF JOB

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To provide general support to the office team by dealing directly with members and potential members and to ensure that excellent customer service is at the core of all communications with members.

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## 3. MAIN RESPONSIBILITIES

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The primary responsibilities are:

- a) To raise the level of member services befitting of a Credit Union ethos by treating everyone as individuals in a professional and friendly manner
- b) To oversee the membership application process to ensure all new members receive relevant information to schedule regarding new accounts
- c) To ensure that all members receive timely and accurate communications relevant to their accounts
- d) To ensure members records are entered and maintained in accordance with the Data Protection Act 1998

The main day to day tasks are:

- e) To answer telephone calls from members relating to account balances, loan decisions, application procedures and other queries
- f) To respond to general email queries
- g) To ensure that all customer enquires, by all communication methods are accurately logged and tracked to an acceptable resolution
- h) To assist with entering of data from applications accurately onto the customer database
- i) To support the loan department with conducting credit checks and in calling members to advise of loan decisions
- j) To assist in the administration of Child Trust Fund accounts.
- k) To assist with filing and other general administrative duties

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## 4. CONDITIONS

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This post is offered initially on a six month fixed term contract.

# **JOB SPECIFICATION**

## **1. Management and supervision**

This role has little or no responsibility for managing others though from time to time may be required to instruct the work of volunteers at the behest of the Operations Manager. The role requires frequent exchange of information with the service delivery teams.

## **2. Accountability and Resources**

This role has shared responsibility for basic resources that are used day to day, but has no direct control of resources.

The post holder will be accountable for their actions and consequences of these actions.

## **3. Job Impact**

The impact of the role may have a substantial impact both internally and externally through the delivery of customer services. Failure to deliver high standards through the direct provision of services may have a substantial impact on the reputation of the credit union.

## **4. Independence and Judgement**

This role requires some judgement to undertake work within clearly established rules, procedures and guidelines however the post-holder is able to refer problems to a supervisor who will provide appropriate instructions and guidance.

## **5. Creativity and Innovation**

Creative thinking and work of an innovative nature is required on a limited and infrequent nature, however this role has the potential to become more innovative as solutions for quality customer services are needed on a more frequent basis

## **6. People and Contacts**

The role will have daily contact with members that may involve personal or sensitive information where tact and discretion are required. The contact is routine in nature and may include preliminary interviewing for the purpose of fact-finding or initial assessment.

This role may have some dealings with suppliers and contractors.

## **7. Working conditions**

The main place of work is head office in Leicester, but on occasion the post holder may be required to visit other branches and outposts. This is a part time post (20 hours) and some weekend and evenings may be required.

## PERSON SPECIFICATION

<b>JOB TITLE</b>	Member Services Officer
<b>FUNCTION</b>	Customer services

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### Area A EXPERIENCE

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- Previous direct experience of working in a customer service environment
  - Experience of inputting information into databases
  - Some experience of tracking and logging customer enquiries
  - Experience of working as part of a team and under own initiative
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### Area B KNOWLEDGE

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- Basic knowledge and understanding of credit unions and their objectives
  - Basic knowledge of what makes good customer services and its importance to maintaining reputation
  - Adequate understanding of what make communications effective
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### Area C SKILLS

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- Use a range of IT tools effectively including Microsoft Outlook, Excel and Word
  - Excellent keyboard skills
  - Communicate issues effectively, verbally and in writing to a range of membership types
  - Organise and prioritise own workload
  - Work co-operatively as part of a team
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### Area D PERSONAL QUALITIES

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- Ability to give each task the right attention to detail
- A team player with empathy towards the demands that a busy credit union has on members of a team
- A friendly, polite and courteous manner is essential to this role at all times
- Excellent time keeping and reliability