

Job Description	
<b>Job Title</b>	Customer Service Team Leader
<b>Department</b>	Operations
<b>Reports to</b>	Customer Service Manager
<b>Location</b>	Head Office/Hybrid
<b>SMF Responsibilities</b>	No
<b>Direct Reports</b>	Customer Service Assistant

Job Purpose
<p>The Customer Service Team Leader will be responsible for the daily management and oversight of the Customer Service Assistants and activities associated with providing a high quality, customer centric service to existing mortgage and savings members, in line with our values and customer promise.</p> <p>This includes support and guidance to ensure the team maintain competency, deliver good customer outcomes, comply with internal procedures and regulatory requirements, and achieve quality standards and service levels.</p>

Principal Duties
<ul style="list-style-type: none"> <li>• Accountable for leading a team providing service and support to mortgage and savings members, to ensure good customer outcomes are being achieved.</li> <li>• Responsible for allocation and distribution of workload fairly and appropriately within the Customer Service Assistants, to ensure activities are prioritised and progressed efficiently and effectively.</li> <li>• In conjunction with the Customer Service Manager and other Customer Service Team Leaders, ensure that resource and capacity management is at an appropriate level to always provide exceptional service.</li> <li>• Responsible for monitoring individual and team KPIs and SLAs, to ensure right first time, consistent delivery of customer service team objectives.</li> <li>• Responsible for overseeing and ensuring all processes and procedures are adhered to, focusing on excellent service, accuracy, efficiency, and compliance with regulatory requirements.</li> <li>• Responsible for monitoring, and compliance of operational control framework within customer service team, ensuring effective controls are in place and are actively managed.</li> <li>• Responsible for the Quality Control and Quality Assurance of customer service functions including telephone calls, system input and correspondence, ensuring the highest standards of service are always maintained.</li> <li>• Ensure the training and competence framework is adhered to and any areas of non-compliance are addressed and managed through regular reviews.</li> <li>• Responsible for training and support of new and existing Customer Service Assistants to create a high performing team culture.</li> <li>• Managing the performance and development of direct reports through effective regular 1:1s, providing constructive and objective feedback to ensure they develop the knowledge, skills and experience to operate effectively.</li> <li>• Champion a customer-centric approach, ensuring a positive customer experience for all members throughout all aspects of the customer journey.</li> <li>• Investigating and resolving customer service complaints, including timely resolution and root cause analysis undertaken.</li> <li>• Continuously identify opportunities to streamline processes which will improve member outcomes, service, efficiency, and quality standards.</li> <li>• Collaborate with other areas of Customer Operations and/or the wider business to optimise the member experience.</li> <li>• Participate in projects as and when required.</li> <li>• Maintaining all customer documents in line with the Society's retention schedule policy.</li> <li>• Act as an advocate of customer service, outcomes, and quality measurements for all business or transformational change initiatives.</li> <li>• Offer service that is tailored to the needs and circumstances of our members.</li> <li>• Present no unreasonable barriers, friction, or delays in serving and supporting customers throughout the lifetime of the relationship.</li> <li>• Respond in timely manner where we do identify harm or the potential for harm, whether financial or non-financial.</li> </ul>

- Recognise vulnerability and support those in the most appropriate way.
- Provide options in a way that customers can understand.
- Any other duties as required by the Customer Service Manager and/or any other Executive within the Society.

#### Requirements of the Role

1. To undertake all activities under Society procedures, policies, and guidelines.
2. Adhere and comply to the Regulators Rules, Codes of Practice and Policy Statements including the principles of Consumer Duty and Treating Customers Fairly.
3. You must avoid causing foreseeable harm to retail customers.
4. You must enable and support retail customers to pursue their financial objectives.
5. To comply with all conduct rules issued by the FCA and/or the PRA.
6. To act as a Brand Ambassador for the Society and ensure levels of professionalism are maintained at all times.
7. To remain at all times fit and proper to perform the functions and responsibilities outlined in this job description.
8. To act in good faith and always do what is right by and for our members.
9. To maintain customer confidentiality ensuring compliance with the Data Protection Act/ UK GDPR.
10. To pro-actively maintain and promote all aspects of office or branch security and health and safety.
11. To continuously develop self and maintain knowledge.

#### General Responsibilities

<b>Society values</b>	Ensure our core values are demonstrated at all times Teamwork, Courage to Challenge, Responsible, Going the Extra Mile.
<b>Conduct</b>	Putting the customer first and making decisions that align with their needs and preferences. Champion the Society's approach to culture, conduct, and brand values. Ensuring corporate and individual behaviours support desired good customer outcomes. Managing individual conduct in line with the conduct rules, fitness and propriety and the Society's Disciplinary Policy.
<b>Risk Culture</b>	Identification, assessment and reporting of risks. Adherence to Society Risk Appetite. Acting as an ambassador for the Society's risk culture and standards, always demonstrating the highest standards of compliance behaviour.
<b>Control Activities</b>	Maintenance of an effective control environment. Identification of key controls and responsibility for their effective operation.
<b>Financial Crime</b>	Awareness and adherence of controls that prevent financial crime, bribery, and corruption.
<b>Legal and Regulatory</b>	Compliance with all applicable laws and regulations
<b>Environmental, Social &amp; Governance (ESG)</b>	Proactively support, advocate, and demonstrate commitment to the Society's ESG strategy, through measured personal contribution to the Society's overall community impact.
<b>Cyber Security</b>	Awareness and adherence of controls and systems of prevention around IT usage and data security.
<b>Security of physical assets</b>	Safeguarding of Society assets.
<b>Third Party Management</b>	Maintain all regulatory requirements for Operational Resilience and Third-party regulations.

#### Conduct Responsibilities

1. You must act with integrity.
2. You must act with due skill, care and diligence.
3. You must be open and cooperative with the FCA, the PRA and other regulators.
4. You must pay due regard to the interests of customers and treat them fairly.
5. You must observe proper standards of market conduct.
6. You must act to deliver good outcomes for retail customers.

### Knowledge, Skills & Experience

- Proven experience in financial services customer service operations, and knowledge within mortgage and savings.
- Track record of successfully managing and leading high-performing teams.
- Passionate about delivering customer service excellence and a drive to achieve the best outcome for the customer.
- Good attention to detail & 'right first time' approach
- Good understanding of regulatory compliance and risk management frameworks, including Quality Control, Quality Assurance and Complaint Handling rules.
- Good knowledge of operational processes and experience in process optimisation and efficiency enhancements.
- Adaptable and flexible mindset to balance workload and schedule with multiple and competing priorities.
- Good communication and interpersonal skills to guide and influence effectively with internal and external stakeholders.