



ROLE DESCRIPTION

Junior Member Service Advisor, Sales and Service
Taree Branch

How do we behave?

Our Values

Core Values

We care for people
We go the extra mile
We make it easy
We are a team
We support our community

Aspirational Values

We smile and have a can-do attitude
We surprise and delight our customers

Permission to play Values

We are reliable and keep our promises
We always act with the highest integrity

Why do we exist?

Our Passion

We are passionate about helping our customers with their financial wellbeing.

What do we do?

We provide transactional services, deposits loans and financial services. "We help customers manage their money".

You are...

- Passionate and genuine in your desire to make a difference by helping customers manage their money
- Personally driven to achieve sales success by reaching targets
- Empathetic, an exceptional listener and a relationship builder
- Accountable, team-oriented, energetic and passionate

Your team are...

- Passionate about being a part of Coastline, a member owned financial institution
- Committed to delivering an exceptional customer service experience
- Here to support you as you grow your career and make the most of professional opportunities, challenges and highlights
- Looking forward to your arrival!

Who do you report to?

- You report to the Branch Manager, who in turn reports to the Head of People and Culture, a key member of Coastline's Leadership Team.

As a Junior Member Service Advisor you are responsible for delivering an exceptional customer service experience and proactively providing solutions to assist our customers manage their money. You model our values, passion and customer centric service through your everyday actions. With you on our team, we can help our customers achieve their goals.



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Experience Essentials

- Grade 12 or equivalent
- Willingness to complete FSRA Tier 2 Certificate within 2 months of commencement
- Strong customer focus and the ability to develop and maintain relationships
- Sound communication, influencing and problem-solving skills
- Results driven with the ability to quickly learn Coastline's range of products and services
- Sound computer skills and previous customer service/sales experience is desirable

What's in it for you?

You have the chance to be part of something different in this growing organisation. For over 50 years, Coastline have been providing members with the same banking services that any bank can, but with one important difference - we exist solely to support the people who live and work in our community. From the very beginning, Coastline's promise to its customers has been to provide the highest level of financial services and products at the absolute lowest possible cost. So set your sights high, make a difference and drive your own development with our team. We want you to be a part of our story.

Your Key Accountabilities

Customer Experience

As a Junior Member Service Advisor, you are the first point of contact for all customers that come into our Branches. You are responsible for delivering an exceptional in-store service experience for our customers. You are always looking for opportunities to help our customers achieve their goals and manage their money. Friendly, authentic and caring, you provide an exceptional service to all existing and potential customers. You take ownership in providing solutions that enrich lives – our customers and our own. You provide accurate information to all customers in a professional and friendly manner. You always maintain customer confidentiality.

Sales Performance

You pro actively identify and act on opportunities to cross-sell and refer business. Your comprehensive knowledge of Coastline and third-party partnership products, policies and procedures ensure you are able to identify the right solution and implement it the right way to deliver an exceptional customer service experience. Your outstanding listening skills and empathy facilitate quality needs-based conversations that leave our customers feeling like they have escaped being treating like a number. You love the buzz of striving for and achieving your individual and team targets!

Processing

You provide efficient and accurate processing of all customer transaction activities, balancing processes, branch documentation and data entry. You show high attention to detail in all transaction processing, as evidenced by minimal errors. You provide processing support to the Team Leader and other team members as required.



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Team Focus

You proactively and energetically contribute to team targets and activities. You work cooperatively and encourage others in achieving their targets. You understand the importance of your contribution and the role you play in delivering better-value banking for our customers. You contribute to a customer centric and inspiring team culture.

Risk Management

Manage and implement a prudent risk management approach in all aspects of yourself and your team. Report and record all risks, hazards and incidents in line with our Risk Management framework and our Risk Appetite Statement. Implement and monitor the Coastline's risk management process to eliminate or minimise WHS hazards and risks where appropriate and manage and respond to any hazards/incidents raised by your team.

Compliance and Workplace Health and Safety

Ensure compliance and statutory requirements are met and compliance of Coastline Policy, standards and procedures and relevant statutory acts and codes. Ensure you and your team comply with Coastline's WHS management system policy, standards and procedures and participate in all WHS required activities. Ensure all compliance training for self and team is completed as required.