

JOB TITLE	Administrator and Post Assistant
REPORTS TO	People and Payroll Advisor
DATE COMPILED	July 2025

JOB DESCRIPTION

CORE VALUES AND INDIVIDUAL CONDUCT RULES

Our five core values define what we're all about and what makes us tick. We're always looking to appoint brilliant people, who share them!

- ✓ **Make a lasting impression** – leave people better than you found them
- ✓ **Proud of our past and excited by our future** – make sustainable decisions that last for generations
- ✓ **Passionate about people** – be warm, straight talking and genuine
- ✓ **Work together** – be a team player, celebrate success, be supportive and give your all
- ✓ **Deliver on promises** – if we say we'll do it, we will

As a Financial Services organisation, we expect all of our colleagues to adhere to the individual conduct rules outlined below:

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

1 MAIN PURPOSE OF JOB:

To support operational departments by scanning and filing documentation, working cohesively to provide general administrative support including answering the phone. To open, sort and manage the incoming post received by the Marsden, as well as managing the outgoing post ensuring mail is appropriately franked and organised to meet Royal Mail requirements

2 DUTIES & KEY RESPONSIBILITIES

- **Scanning, filing and documentation management**
 - Supporting operational teams with the filing of key documents.
 - Ensuring that branch scans of withdrawals and closures have been correctly read by OCR software and, where they haven't, sorting this manually and ensuring they are processed correctly.
 - Responding to requests from operational teams to search for documents both electronically and through physical files.
 - Responding to ad hoc queries from operational teams to support with packaging mailshots, and scanning documentation.
- **Opening and sorting incoming post**
 - To open and sort the incoming post daily ensuring that the post is handed directly to, or scanned to, departments as required.
 - Ensure any original documentation received via the mail is handled appropriately to ensure it is returned to sender.
 - Ensuring any important items received (e.g. bank cards or card readers) are handed to the right person and the IT team kept informed.
 - Retaining documents received in line with GDPR and filing these appropriately.
- **Handling outgoing post**
 - Ensuring that the franking machine is set up to frank post with the correct rate (2nd or 1st class).
 - Franking mail appropriately.
 - Placing mail into the right sacks for collection by Royal Mail, ensuring compliance with their processes so that mail is sent appropriately (recorded, special delivery, overseas etc.)
 - Ensuring that post-related supplies are stocked appropriately, and the franking machine has sufficient credits.
- **Taking general calls and providing basic customer service**
 - Taking general calls, when requested, and transferring calls to the right department.
 - Taking messages for colleagues accurately, and ensuring these are passed on.
 - Demonstrating a polite and friendly telephone manner in all conversations, in line with the Marsden approach to exceptional customer service.

3 STANDARD EXPECTATIONS

All postholders across the Society are expected to adhere to the following expectations:

- Confidentiality - working within the Society the post holder may gain knowledge of confidential matters; such information must be regarded as strictly confidential and not disclosed further. Failure to observe this confidentiality clause could result in disciplinary action.
- Codes of Conduct and Accountability - the post holder is expected to comply with FCA and PRA requirements, with specific reference to Senior Management and Certification regime (SMCR) and conduct rules for all staff.
- Health and Safety and Security - all employees have a duty for their own and others safety and to report any accidents, complaints or untoward incidents as per Marsden procedure.
- Valuing Diversity and Promoting Equality - as an equal opportunities employer all staff are required to comply with relevant policies and procedures.
- Training - staff have a duty to complete all required continuous professional development and training.
- Vulnerable Customers - to contribute to the safety of our customers who require additional support by identifying where a need exists and taking the appropriate steps to ensure any barriers are removed when dealing with their enquiry and appropriate monitoring of both the account and the customers circumstances takes place periodically to ensure fair customer outcomes. Branch/Department Champions provide advice and support to colleagues to assist them in meeting their responsibilities in contributing to the safeguarding of our customer.

The range of duties and responsibilities outlined in this job description are indicative only and intended as a broad guideline of the range and type. They are subject to modification in the light of changing demands and development requirements of the post holder.

PERSON SPECIFICATION

Factors	Essential	Desirable
Education & Qualifications	<ul style="list-style-type: none"> • GCSE Maths and English (Grade A – C) or relevant comparable experience. 	
Knowledge, Skills & Abilities	<ul style="list-style-type: none"> • Excellent communication skills. • Computer literate, able to use MS Office. • Able to work under pressure and prioritise. • Approachable and confident. • Attention to detail and accuracy. • Excellent organisational skills and the ability to multi-task. • Ability to work confidently and diligently with confidential documents. • Excellent telephone manner. 	<ul style="list-style-type: none"> • Previous experience of working within a post or administrative setting. • Previous experience of working within Financial Services. • Understanding of basic GDPR and its application to filed documents.