

JOB TITLE	Assistant Branch Manager
REPORTS TO	Branch Manager
DATE COMPILED	November 2023

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 the Branch Manager to lead, focus, coach and motivate a team, utilising and developing your own skills to add increased value to the Marsden and our customers in accordance with risk guidelines and regulatory framework.

2 DUTIES & KEY RESPONSIBILITIES

- **Support the Branch Manager in leading, developing and motivating employees:**
 - Inspire staff through role modelling and your own behaviour.
 - To support the Branch Manager in creating a positive branch environment where the culture is open and honest for staff and customers.
 - Support the Branch Manager to recognise and praise good performance.
 - Take guidance from the Branch Manager to identify and address staff training and coaching/development needs.
 - To support the Branch Manager to understand what engages and enables the individuals in your team and positively influence this.
 - Complete timely observations and offer constructive feedback and coaching to motivate your team.
 - Ensure that regular focus meetings and development plans are completed in a timely manner and regularly reviewed.
 - Support the Branch Manager to encourage personal professional development to build capacity, develop potential and support career development within the society.
- **Support the Branch Manager in delivering branch business plans to the team, ensuring they all understand their own contribution to the plan:**
 - Support the Branch Manager to achieve the branch expectations in line with the society's business plan using your skills and the tools provided to performance manage.
 - Ensure that the branch business plan is communicated to the team and individual objectives are set to achieve the plan, reviewing on a regular basis.
 - Update your team regularly on both their individual and branch performance through regular focus meetings.
 - Encourage skilful conversations to maximise opportunities highlighting the benefits of the societies product range.
 - Take instruction from the Branch Manager to communicate changes and developments to the team and individuals so they understand how this affects the society and the individual.
 - Telephone customers to ensure service standards are being maintained and evidence recorded as appropriate.
 - Drive a culture of a precise and accurate approach to support our exceptional customer journey and reduce impact on operational risk.
- **Support the Branch Manager to ensure all operational and regulatory risk is effectively managed:**

- Ensure that you and your team comply with all policies, processes and requirements to protect you, your customer and your branch, and any breaches are investigated and appropriate corrective action taken.
 - Manage operational risk by monitoring high risk areas of the business and auditing branch activity.
 - Monitor branch cash limits to ensure risk is not taken outside of the societies insured boundaries.
 - Monitor cheque and passbook stock levels held in the branch.
 - Ensure that time is allocated to your team to ensure that all regulatory and procedural training is up to date.
 - Regularly review error logs and MI data, and under guidance from the Branch Manager, take action where appropriate.
 - Accurately complete cheque and cash banking with the requirement of delivering the items to the bank safely and securely.
 - Responsible for the safe keeping of branch keys, alarm and safe codes with additional responsibility of opening the branch when required.
- **Decision making in relation to:**
 - Daily banking of cheques and cash.
 - Authorising cash withdrawals above branch daily limit.
 - Authorising petty cash payments.
 - Ordering of stationary.
 - Supporting the Branch Manager in the recruitment of Customer Representatives.
 - Complaint escalation.
 - Effective use of branch resource and future needs to support business objectives.
 - Authorising colleague holidays and supporting the Branch Manager with managing sickness absence.
 - Refer to guidance from the Branch Manager to ensure new starters have the correct training and induction to complete their role compliantly, understanding the seven principles and skilful conversation.

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 board 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"> ● GCSEs or equivalent qualifications in Maths and English graded C or above ● Sign off and accreditation for third party specialists as set out in the T&C framework 	<ul style="list-style-type: none"> ● CeMAP or equivalent qualification ● ICT Level 2 ● A full UK driving licence
Knowledge, Skills & Abilities	<ul style="list-style-type: none"> ● Excellent customer service experience, with a good understanding of consumer duty. ● Experience of interacting with customers, identifying needs and appropriate outcomes to support the customer journey. ● Experience of working within the Financial Services sector. 	<ul style="list-style-type: none"> ● Knowledge of the Society's product range.

	<ul style="list-style-type: none">• Excellent numeracy and accuracy skills to ensure compliance with operational and regulatory risk concerns.• Proven ability to communicate effectively at all levels (written & verbally).• The ability to lead a team.• The ability to make decisions and drive a team in the absence of the Branch Manager	
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