

JOB DESCRIPTION

Role Name	Member Services Advisor
Reports To	Operations Officer
Contract Type	Permanent (subject to successful completion of a probationary period), Full-Time (35 hours per week) We will also consider 25 hours per week pro rata.
Salary Banding	£24,479
Role Purpose	To play a key role in delivering high-quality customer service to Credit Union members. This includes handling account and loan enquiries, processing transactions, maintaining accurate member data, and providing support across all communication channels. All interactions should be handled professionally, courteously, and in line with the values and standards of the Credit Union.
Key Responsibilities	Member Support & Customer Service • Provide excellent customer service across all channels including phone, email, messaging, face-to face and web interaction • Advise members on Credit Union services, products, and policies • Support members in using digital platforms such as the Mobile App and online access • Respond to general membership enquiries and maintain high levels of member satisfaction • Uphold the principles of consumer duty and customer care in all interactions Account & Transaction Management • Process membership applications and maintain accurate member records

	• Set up and manage member payments including standing orders, payroll deductions, and benefits • Handle cash transactions and perform daily cash reconciliation • Ensure accurate and timely processing of all account transactions in line with policies and procedures • Ensure full security and data protection whilst dealing with accounts • Input and track loan enquiries and applications using the core member accounting system Administrative Duties • Perform general office and reception duties as required • Maintain compliance with data protection legislation and internal policies • Complete all tasks in a timely and accurate manner, adhering to regulatory requirements • Undertake any other duties as required, commensurate with the role
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Person Specification

Essential Skills & Experience

- Strong customer service and interpersonal skills
- Excellent verbal and written communication skills
- Excellent telephone manner
- Excellent attention to detail
- Ability to deliver work to deadlines and manage competing priorities
- Confident using IT systems, including Microsoft Office
- Experience in a customer service environment
- Experience inputting data accurately and processing applications
- Experience logging and tracking customer enquiries
- Good literacy and numeracy skills
- Ability to remain calm under pressure
- Strong team player with good communication and collaboration skills
- Ability to take responsibility for own workload and prioritise effectively
- Commitment to following the Credit Union's ethos, policies, and values

What We Offer

We are committed to supporting your professional development and wellbeing. As a valued member of our team, you will benefit from:

- Competitive salary
- 25 days annual leave plus bank holidays
- Additional benefits upon successful completion of probation
- Death in Service cover (£20,000)
- Additional death benefit based on double salary
- Critical Illness Insurance
- £100 annual uniform allowance
- Christmas reward payment (currently £200)
- An additional day off for your birthday
- Access to an Employee Assistance Programme (EAP), including counselling and cashback on dental, optical, and chiropody expenses (up to £800 per annum)
- Enhanced sick pay (subject to qualifying criteria)
- Holiday trading scheme (buy/sell up to 5 days annually)

Desirable Attributes

- Knowledge and understanding of credit unions and their objectives
- Experience in a financial services or banking environment
- Friendly, polite, and courteous manner
- Empathy for members and colleagues
- Excellent timekeeping and reliability
- Ability to work under pressure and seek guidance when needed

Additional Information

- A willingness to undertake training is essential
- Appointment is subject to a satisfactory credit check and DBS clearance