

## Job Description

|                 |  |
|-----------------|--|
| Role Title:     | Ecology Community Branch Service Specialist  |
| Team:           | Branch/Operations  |
| Reporting to:   | Ecology Community Branch Manager   |
| Direct Reports: | None   |
| Salary:         | £24,500 per annum pro rata   |
| Contract:       | Permanent, Full Time/Part Time considered  |
| Hours:          | 35 hours per week, Monday – Saturday, between the hours of 8am and 6pm (1-hour unpaid lunch) |
| Place of Work:  | Porth  |
| Benefits:       | 25 days holiday (pro rata), plus bank holidays, Company Pension                              |

### Ecology's Purpose

*In a world that doesn't add up, daring to be different is our calling, lending our power so everyone's story gets a chance to thrive.*

### Role Purpose

As a Branch Service Specialist, you'll be the first point of contact for customers visiting the branch. You will provide friendly, accurate and efficient service, supporting customers with day-to-day enquiries and helping them understand our products and services. You will play a key role in delivering a positive branch experience, supporting the Branch Manager, and contributing to the achievement of branch goals in line with Ecology's mission.

This role is essential in helping the community feel welcomed, supported, and connected to Ecology, acting as a trusted guide for both Ecology and non-Ecology customers who visit the branch.

### Main Duties & Areas of Responsibility

Examples of duties include, but are not exclusive to:

- Providing excellent customer service, ensuring every visitor receives a friendly and helpful experience
- Supporting customers with queries about savings, mortgages, and general information
- Assisting with customer reviews, follow up calls and outbound calling when needed
- Helping to maintain a safe, tidy, and welcoming branch environment
- Assisting with day-to-day branch tasks, including basic administration and updating systems accurately
- Supporting community focused activity, such as signposting local support and assisting with branch events or information sessions

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- Working closely with the Branch Manager and Head Office colleagues to ensure smooth operations and effective handovers
- Upholding Ecology values and behaviours in every interaction
- Ensuring compliance with policies, procedures and Consumer Duty requirements to deliver fair outcomes for Members

### Skills and Experience

#### Essential

- A positive, can-do attitude aligned with Ecology values
- Strong customer service skills
- Clear and confident verbal and written communication
- Welsh speaking
- Excellent attention to detail and accuracy
- Ability to stay organised and manage multiple tasks
- Confident using initiative to help resolve queries
- Experience working in a customer facing role

#### Desirable

- Experience in a financial services environment (e.g. banking, building societies, customer contact centres)
- Knowledge of savings or mortgage products
- Good IT skills, including Microsoft Word and Excel

### Other

- You have a legal duty to take reasonable care of your own health and safety and that of others and you are expected to be familiar with, and adhere to Ecology's Health and Safety Policy
- Ensure your work, communication and approach conforms to the values and behaviours of the Society.
- Keep up to date, and comply with Ecology's rules, Policies and Procedures.
- Undertake any reasonable duties requested by management.
- As part of your role, you are responsible for upholding the principles of Consumer Duty by ensuring that the needs, preferences, and interests of members are at the forefront of decision-making, delivering fair outcomes, and acting in a way that promotes member trust and confidence
- This role has a six-month probation period

## Job Description

Acceptance

Print Name: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

## Behaviours and Values

| Behaviour  |  | Our Collective Commitments  |  |   | Examples of Bringing My Best Self to Work   |   |
|--|--|---|--|---|---|---|
| <b>Deliver Together</b>  | <p>We've always believed that, together we can achieve more. Working with our stakeholders and Members to create incredible impact.</p> <p>That's why <b>Deliver Together</b> is the heartbeat of everything we do. By combining our unique strengths, perspectives, and talents, we know there is no challenge too great, no goal too ambitious. Together, we're unstoppable.</p> <p>Deliver Together means learning from one another, recognising that every person brings something valuable to the table. We know the best solutions emerge when we combine our insights, learn from our differences, and respect each other's expertise.</p> <p>When we <b>Deliver Together</b>, we tackle challenges as a united front, sharing our successes, learning from our setbacks, and always supporting each other to be better. Creating something that's greater than the sum of our parts.</p> <p><b>Let's Deliver Together. Because together, we can achieve the extraordinary.</b></p> |   |  |   | <ul style="list-style-type: none"> <li>• I collaborate with others, considering the bigger picture and doing the right thing for Ecology and our Members</li> <li>• I deliver on our collective commitments, providing amazing service to our Members, and to my fellow colleagues</li> <li>• I am purposeful in my actions, respecting people's time and using it wisely</li> <li>• I choose the right communication tools and methods to align with the goals, complexity, and urgency of the activity</li> <li>• I evaluate the strengths of the team, ensuring that the right individuals are involved</li> <li>• I welcome diverse perspectives and encourage inclusivity</li> </ul> |   |
|  | <b>Lead With Care</b>  | <p>At Ecology we care deeply about our planet, the people we work with and the Members we serve.</p> <p><b>Lead With Care</b> means being honest and supportive - the cornerstones of strong relationships and lasting success. It's about being authentic, patient, compassionate and understanding. It's appreciating that everyone's journey is unique and taking time to encourage, uplift and help each other.</p> <p>We recognise the power of words and the responsibility we carry when we communicate, offering feedback that is constructive and kind – and always keeping the well-being of others in mind. We share our thoughts clearly and respectfully, without fear of judgment.</p> <p>To <b>Lead With Care</b> is to embrace openness with courage, even when it's difficult, knowing that honesty drives meaningful change that makes a difference.</p> <p><b>Let's Lead With Care. In every action, every word, and every step we take.</b></p> |  |   |   | <ul style="list-style-type: none"> <li>• I am kind to myself, asking for help when needed</li> <li>• I build trust through consistency and reliability</li> <li>• I help when needed, stepping in with a willingness to support</li> <li>• I share truth with care, offering feedback that is constructive and kind, and delivering it in a way that helps others grow, without judgment or blame</li> <li>• I am mindful of how my actions, decisions, and communication affect people and our planet</li> <li>• I actively listen and seek to understand the needs of others, being present in the moment</li> <li>• I celebrate successes, offering thanks and praise for a job well done</li> </ul> |
| <b>Values</b>  |  |   |  |   |   |   |
| <b>Fairness:</b> Treating everyone individually and with respect |  | <b>Openness:</b> Listening to each other's views and opinions   |  | <b>Responsibility:</b> Doing what we say we'll do. Making pragmatic decisions, staying true to our values |   | <b>Co-operation:</b> Working together, receptive to the knowledge and opinions of others  |
|  |  |   |  |   |   | <b>Activism:</b> Empowering colleagues to be advocates for change   |

## Behaviours and Values

| Behaviour  |  | Our Collective Commitments   |   |   | Examples of Bringing My Best Self to Work |  |
|--|--|--|---|---|---|--|
| <b>Own Your Impact</b>   | At Ecology, we make an incredible impact on our environment and the communities around us. And we all play a part in making this happen. | <p><b>Own Your Impact</b> is a promise to ourselves to take full ownership of our actions, our commitments, and the outcomes we create. It means delivering on our promises and taking accountability for the results we achieve.</p> <p>To <b>Own Your Impact</b> is to make considered decisions, even when the path isn't easy. It's about achieving a high standard of excellence and recognising that our individual actions contribute to the collective success of our team. We do what we say we will – and we do it to the best of our ability.</p> <p><b>Own Your Impact</b> means being proactive by anticipating challenges, taking the initiative to find solutions, and owning the process from start to finish. We lead by example, knowing that true accountability means creating positive impact that drives the right results.</p> <p><b>Let's Own Our Impact. Let's be accountable for our actions and for our future.</b></p> | <ul style="list-style-type: none"> <li>• I take ownership of my performance and development, achieving my objectives and building the skills I need for future success</li> <li>• I own the process from start to finish, taking responsibility for every step</li> <li>• I have clarity over my role and know what's expected of me</li> <li>• I do what I say I will, managing stakeholder expectations with clear communication and deadlines</li> <li>• I consider risks carefully, seeking feedback to guide my path and being mindful of possible outcomes.</li> <li>• I embrace feedback and use it to improve, seeking opportunities to learn from others</li> <li>• I am self-aware, reflecting on my own actions and impact, and I believe in my own abilities</li> </ul> |   |   |  |
|  | Ecology started from a brave decision to do something that others wouldn't. Pioneer the possible.  |  | <p><b>Dare To Be Different</b> means stepping into the unknown with confidence, challenging the status quo, taking considered risks that may lead to incredible impact. It's about having the courage to voice new ideas, even when they seem bold or unconventional.</p> <p>To <b>Dare To Be Different</b> means making tough decisions, when others won't, and being brave enough to change course if it's the right thing to do. We are strong enough to own our mistakes, being resilient in the face of setbacks. We embrace failure, seeing it is a stepping stone to success, sharing what we learn to help each other.</p> <p>We lead with confidence to inspire others to greatness.</p> <p><b>Let's Dare To Be Different. Let's inspire the world around us.</b></p>      | <ul style="list-style-type: none"> <li>• I speak up and challenge respectfully, with a focus on finding solutions</li> <li>• I'm positive and inspiring, strong in the face of adversity and resilient when facing setbacks</li> <li>• I don't let fear or disappointment derail my efforts</li> <li>• I'm brave enough to step out of my comfort zone, challenging the status quo to achieve the right results</li> <li>• I lead with humility, accepting my mistakes, listening to others, and being brave enough to change course when it's the right thing to do</li> <li>• I champion sustainability, pushing for positive change so we can create a better world</li> </ul> |   |  |
| <b>Values</b>  |  |  |   |   |   |  |
| <b>Fairness:</b> Treating everyone individually and with respect | <b>Openness:</b> Listening to each other's views and opinions  | <b>Responsibility:</b> Doing what we say we'll do. Making pragmatic decisions, staying true to our values  | <b>Co-operation:</b> Working together, receptive to the knowledge and opinions of others  | <b>Activism:</b> Empowering colleagues to be advocates for change   |   |  |